

## CalSAWS CCB Agenda

<b>DATE</b>	JUNE 25, 2020
<b>TIME</b>	1:30 PM
<b>LOCATION</b>	North: Sutter Conference Room, South: Conference Room 331
<b>SUBJECT</b>	Change Control Board Meeting
<b>INVITEES</b>	Regional Managers, Design Leads, Tech Leads, Release Management Leads, Quality Assurance, State Partners, Consortium Management

### Meeting Purpose:

Approve pending System Change Requests (SCRs), scope modifications, and change orders as needed.

### 1. C-IV SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.05	CIV-107312		Add T-Sign Functionality for Additional Forms	Client Correspondence	80	C-IV M&O	Production Deployment	20.06.18
20.05	CIV-107334	CA-216634	Post CalHEERS UIB Clean-up list to CalSAWS portal	Batch Operations	10	C-IV M&O	Production Deployment	20.06.03
20.07	CIV-107277		Online Help: Update CFP - Family Stabilization	Training	10	C-IV M&O	Start Build	
20.09	CIV-107074	CA-215751	2020 Medicare Savings Program Property Limit	CalHEERS	45	C-IV M&O	No	
20.09	CIV-107088	CA-215774	Update Last Month of Reversal for SSI Cash Out Population	Eligibility	62	C-IV M&O	Production Deployment	
20.09	CIV-107435		Update C4Yourself Android Mobile App to support API level 29 or higher	Tech Arch	120	C-IV M&O	Start Build	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.06	CIV-10791	CA-58123	Prevent Advancing Medi-Cal Renewal with a Soft Pause Individual	CalHEERS	470	C-IV M&O	Start Build	
20.07	CIV-4400		Add General Assistance (Managed) Program NOAs and Forms	Client Correspondence	522	C-IV M&O	Start Build	
20.07	CIV-106413		Lobby Mgmt: Update Lobby Dashboard to include Responsive Voice API Key	Tech Arch	60	C-IV M&O	Start Build	
20.09	CIV-12446	CA-52597	CA 812 Collection Reports Claim Adjustments	Reports	424	C-IV M&O	No	
20.09	CIV-104879	CA-210119	ACIN I-44-19 Update State PINS to 8 digits	Fiscal	287	C-IV M&O	No	

## 2. LRS SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.05	CA-212389		Add new navigation links/pages (financials) on CalSAWS website	Release Communication	8	C-IV M&O	No	20.06.xx
20.05	CA-214605		Turn on GR Discontinuance job and Cancel Customer Activities	Online	196	LRS M&E	Production Deployment	20.07.15
20.05	CA-216502		Enable GR Discontinuance in EDBC from August month forward	Eligibility	76	LRS M&E	Production Deployment	20.07.15
20.05	CA-216634	CIV-107334	Post CalHEERS UIB Clean-up list to CalSAWS portal	Batch Operations	10	LRS M&E	Production Deployment	20.06.03
20.05	CA-216787		Advance GR AA Due Month and Update Customer reporting records for GR QR7, AA and SSP14	Client Correspondence	259	LRS M&E	Production Deployment	20.07.15
20.05	CA-216886		To disable/turn off the GROW Orientation and CMA Appointment jobs.	Batch Operations	17	LRS M&E	Production Deployment	20.06.03
20.06	CA-216325		[Analytics] Release D Reports Re-Platform	Analytics	8160	CalSAWS DD&I	Start Build	20.06.30
20.07	CA-216933		Training Release 20.07 - Training Environment Support	Training	60	LRS M&E	No	20.07.24
20.09	CA-202684		ACL 18-50 - Implement Redesigned CalFresh Overissuance NOAs - Phase 1	Client Correspondence	233	LRS M&E	Start Build	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CA-205915	CIV-102915	Upgrade iText PDF and Imaging library	Tech Arch	360	LRS M&E	No	
20.09	CA-212012		Automated Regression Test (ART) - Ongoing Case Maintenance Scenarios - Phase 1	Automated Test	80	LRS M&E	Start Build	
20.09	CA-214172		DDID 2242, 2500, 2501, 2502, 2503, 2267, 2255, 2516, 2517, 2518, 2204, 2521 - Multi, Import, Virtual Capture	Imaging	449	CalSAWS DD&I	No	
20.09	CA-214990		DDID 2578 FDS: Non State Forms - Add CSF 105 Form	Client Correspondence	34	CalSAWS DD&I	Start Build	
20.09	CA-214991		DDID 2578 FDS: Non State Forms - Threshold Languages - Add CSF 105	Client Correspondence	49	CalSAWS DD&I	Start Build	
20.09	CA-215088		DDID 2627 FDS: Non State Forms - Threshold Languages - Update CW 2213	Client Correspondence	39	CalSAWS DD&I	Start Build	
20.09	CA-215089		DDID 2627 FDS: Non State Forms - Update CW 2213	Client Correspondence	6	CalSAWS DD&I	Start Build	
20.09	CA-215104		DDID 2635 FDS: Non State Forms - Threshold Languages - Update CW 2201	Client Correspondence	39	CalSAWS DD&I	Start Build	
20.09	CA-215105		DDID 2635 FDS: Non State Forms - Update CW 2201	Client Correspondence	11	CalSAWS DD&I	Start Build	
20.09	CA-215118		DDID 2642 FDS: Non State Forms - Migrate PUB 388	Client Correspondence	5	CalSAWS DD&I	Start Build	
20.09	CA-215119		DDID 2642 FDS: Non State Forms - Threshold Languages - Migrate PUB 388	Client Correspondence	34	CalSAWS DD&I	Start Build	
20.09	CA-215751	CIV-107074	2020 Medicare Savings Program Property Limit	CalHEERS	50	LRS M&E	No	
20.09	CA-215774	CIV-107088	Update Last Month of Reversal for SSI Cash Out Population	Eligibility	162	LRS M&E	Production Deployment	
20.09	CA-216150		Automated Regression Test (ART) - Ongoing Case Maintenance Scenarios - Phase 2	Automated Test	220	LRS M&E	Start Build	
20.09	CA-216151		Automated Regression Test (ART) - Ongoing Case Maintenance Scenarios - Phase 3	Automated Test	310	LRS M&E	Start Build	20.10.XX
20.11	CA-200321	Tracker-951	Display the Collect button on the Issuance Detail page for all Service Payments	Fiscal	86	C-IV M&O	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.11	CA-203748		Move accounts from GR Assistance Unit to GRAH Budget Unit	Fiscal	45	LRS M&E	No	
20.11	CA-214052		DDID 2514 - Handling Other County's Documents	Imaging	502	CalSAWS DD&I	No	
21.01	CA-214047		DDID 2510 - Append Similar Images Together	Imaging	13	CalSAWS DD&I	No	
21.01	CA-214048		DDID 2199, 2502, 2255, 2503 - Categorize by OCR	Imaging	3364	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.05	CA-212924		Modify DPSS Renewals Performance Measures Dashboard	Reports	453	LRS M&E	Start Build	20.06.05
20.05	CA-216190		Continue Posting List of DCFS Medi-Cal Discontinuances from Batch EDBC	CalHEERS	15	LRS M&E	No	20.06.24
20.06	CA-58123	CIV-10791	Prevent Advancing Medi-Cal Renewal with a Soft Pause Individual	CalHEERS	1085	LRS M&E	Start Build	
20.06	CA-213788		Provide Adobe Captivate Support to Consortium Training Team	Training	50	CalSAWS DD&I	No	20.07.17
20.06	CA-214818		Training: Update Security Administration WBTs for 20.03 App Dev Changes	Training	30	LRS M&E	No	20.07.17
20.07	CA-200879		ACL 19-95 Automate Disaster CalFresh	Eligibility	11609	Premise	Start Build	
20.09	CA-52597	CIV-12446	CA 812 Collections Enhancement Report	Reports	450	LRS M&E	No	

### 3. Informational Only: CalSAWS DDID SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CA-209485	CIV-102318	DDID #1783 - Architecture Normalization: Replace EWS API with Microsoft Graph API	Tech Arch	775	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CA-211117		DDID 1147 - Migrate the Issuance - Replacement Cash EBT Benefits Job Aid	Training	5	CalSAWS DD&I	No	
20.09	CA-213976		Convert to Stream Architecture – MEDS EW25, EW05, EW45, EW12 Transactions	Batch/Interfaces	1440	CalSAWS DD&I	Start Build	
20.09	CA-216171		[Analytics] Release E OBIEE Dashboards Re-Platform	Analytics	10000	CalSAWS DD&I	No	20.09.30
20.09	CA-216767		[Analytics] Release E Reports Re-Platform	Analytics	10000	CalSAWS DD&I	Start Build	20.09.30

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.07	CA-213988		Replace Oracle IAM Security Stack	Tech Arch	2365	CalSAWS DD&I	Start Build	20.08.08
20.07	CA-211764		DDID 1967: Migrate the M40-181C SAR (9/13)	Client Correspondence	169	CalSAWS DD&I	No	
20.07	CA-207467		DDID 347 - Migrate Rush Warrant Functionality and Warrant Print Stocks to CalSAWS	Client Correspondence	400	CalSAWS DD&I	No	
20.07	CA-207351		DDID 1311 - Update to Specialized Supportive Services Detail page and PA 1913	Client Correspondence	171	CalSAWS DD&I	No	

#### 4. Informational Only: CalSAWS Conversion SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
None								

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
None								

The next CCB Meeting scheduled for **07/09/2020**.

## 5. CalACES Development Schedule

Release #	Release Date (Mon)	CalACES (North & South) Production Deployment Date (Sun)	Notes	SCR Freeze (Fri)	Defect Freeze (Fri)	Hard Defect Freeze (Fri)	Build Approved (Wed)
20.03	3/23/2020	3/22/2020		1/31/2020	2/28/2020	3/6/2020	3/18/2020
20.05	5/18/2020	5/17/2020	Due to Memorial Day 5/25/2020	3/27/2020	4/24/2020	5/1/2020	5/13/2020
20.06	6/29/2020	6/28/2020	CalHEERS Release	4/17/2020	6/5/2020	6/10/2020	6/3/2020
20.07	7/20/2020	7/19/2020		5/22/2020	6/26/2020	7/3/2020	7/15/2020
20.09	9/21/2020	9/20/2020		7/24/2020	8/28/2020	9/4/2020	9/16/2020
20.11	11/23/2020	11/22/2020	Due to Thanksgiving 11/26/2020	9/25/2020	10/30/2020	11/6/2020	11/18/2020
21.01	1/25/2021	1/24/2021	MLK 1/18	11/27/2020	1/1/2021	1/8/2021	1/20/2021
21.02	2/15/2021	2/14/2021	CH Release (North & South Release)	11/6/2020	1/22/2021	1/27/2021	1/29/2021
21.03	3/22/2021	3/21/2021	North & South Release	1/29/2021	2/26/2021	3/3/2021	3/5/2021
21.04	4/26/2021	N/A	CH Cloud Release	N/A	N/A	N/A	N/A
21.05	5/24/2021	5/23/2021	Due to Memorial Day 5/31 (North & South Release)	3/26/2021	4/30/2021	5/5/2021	5/7/2021
21.06	6/7/2021	6/6/2021	CH Release (North & South Release)	4/2/2021	5/14/2021	5/19/2021	5/21/2021
21.07	7/26/2021	7/25/2021	Last C-IV Baseline Release	5/28/2021	7/2/2021	7/7/2021	7/9/2021
21.09			No Release - C-IV Converts to CalSAWS				
			C-IV to CalSAWS Cutover (End of September)	N/A	N/A	N/A	N/A
21.11	11/22/2021	11/21/2021		8/27/2021	10/29/2021	11/3/2021	11/5/2021
22.01	1/24/2022	1/23/2022		11/26/2021	12/31/2021	1/5/2022	1/7/2022
22.02	TBD		CH Release				
22.03	3/21/2022	3/20/2022		1/28/2022	2/25/2022	3/2/2022	3/4/2022
22.05	5/23/2022	5/22/2022	Due to Memorial Day 5/30	3/25/2022	4/29/2022	5/4/2022	5/6/2022
22.06	TBD		CH Release				
22.07	7/25/2022	7/24/2022		5/27/2022	7/1/2022	7/6/2022	7/8/2022
22.09	9/26/2022	9/25/2022		7/29/2022	9/2/2022	9/7/2022	9/9/2022
			CalWIN to CalSAWS Wave 1 Cutover (End of October 2022)	N/A	N/A	N/A	N/A

22.11	<b>11/21/2022</b>	11/20/2022		<b>9/30/2022</b>	10/28/2022	11/2/2022	11/4/2022
23.01	<b>1/23/2023</b>	1/22/2023		<b>11/26/2022</b>	12/30/2022	1/4/2023	1/6/2023
			CalWIN to CalSAWS Wave 2 Cutover (End of February 2023)	<b>N/A</b>	N/A	N/A	N/A
			CalWIN to CalSAWS Wave 3 Cutover (End of April 2023)	<b>N/A</b>	N/A	N/A	N/A
			CalWIN to CalSAWS Wave 4 Cutover (End of June 2023)	<b>N/A</b>	N/A	N/A	N/A
			CalWIN to CalSAWS Wave 5 Cutover (End of August 2023)	<b>N/A</b>	N/A	N/A	N/A
			CalWIN to CalSAWS Wave 6 Cutover (End of October 2023)	<b>N/A</b>	N/A	N/A	N/A

<b>Freeze Dates</b>	
SCR Freeze:	Deadline for all SCR code to be delivered for baseline release
Defect Freeze:	Deadline for all Defects to be delivered for baseline release
Hard Defect Freeze:	Deadline for all Defects (tied to baseline release) to be delivered for baseline release
Build Approved:	Greenlight for baseline release

# [CIV-107312] Add T-Sign Functionality for Additional Forms

- Resolved: 06/10/2020 12:13 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Sureshnaidu Mullaguri</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Connor Gorry</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.06.18</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>80</b>
Reporter:	<b>Connor Gorry</b>	Regulation Reference:	<b>Exec Order</b>	Created:	<b>05/20/2020 08:54 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen Rappanotti on 3/16/2020

**Current Design:** Some Forms currently have the Telephonic Signature (T-Sign, or Check-to-Sign) functionality, while others do not.

**Request:** Add T-Sign functionality to requested Medi-Cal Forms and Packets.

**Recommendation:** DCR to add the Following Forms to allow for use of Telephonic Signature:

MC 604 IPS : Additional Income and Property Information Needed for Medi-Cal  
CCP 7 : CalWORKs Stage One Child Care Request Form and Payment Rules  
CCP 8 : CalWORKs Stage One Child Care Authorization Form  
CW 52 : CalWORKs Assistance Unit and Child Support Rules  
VER 103 CIV: Immunization Verification  
VER 104 CIV: Employment and Income Verification  
MC 210A : Supplement to Statement of Facts for Retroactive Coverage/ Restoration  
MC 371 : Additional Family Members Requesting Medi-Cal  
CMSP 203 : Other Health Coverage  
SAWS 2 Plus - APPENDIX C : Assistance with Completing This Application  
DHCS 7077 : Notice Regarding Standards for Medi-Cal Eligibility  
WTW 17 : Waiver for CalWORKs Learning Disabilities Screening And/Or Evaluation

Add Telephonic Signature functionality for the following Packets:

Mixed MC RE Packet  
MAGI RE Packet  
Non-MAGI LTC Mixed HH RE Packet  
Non-MAGI Screening Packet  
Non-MAGI Turning 65 Packet  
MC RE/ABD RE Packet  
LTC MC RE Packet

Assumption: Form Names and Form numbers will not be updated with this SCR. The only changes for the forms identified above will be the addition of Telephonic Signature functionality.

**Outreach Description:** Job Aid - Electronic Signature (e-sign) must be updated to reflect the addition of Telephonic Signature (Check-to-sign) for these Forms.

**Migration Impact Description:** These forms will have T-Sign Added in LRS in a future change.

**Migration Impact Analysis:**



**Alternative Procedure Description:**  
**Operational Impact Estimate:** N/A  
**80**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	45
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	35	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CIV-107334] Post CalHEERS UIB Clean-up list to CalSAWS portal

- Resolved: 06/10/2020 09:51 AM

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Ryan O'Mary</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.06.03</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>10</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>05/22/2020 03:12 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Documentation</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-216634</b>

**Non-Committee Review:** Approved by Karen Rapponotti on 3/16/2020

**Expedite Approval:** Approved by Karen Rapponotti on 3/16/2020

**Current Design:** CalHEERS Portal did not have a way to differentiate regular Unemployment Insurance Benefits (UIB) from the Pandemic Unemployment Compensation (PUC) until 5/18/2020. PUC is not countable for the MAGI Medi-Cal program, but it is countable for the Covered California Programs.

**Request:** DHCS requested CalHEERS to export a list of CalHEERS cases where at least one person entered UIB in their application on the CalHEERS portal and were found to be MAGI Ineligible from when the PUC was issued from EDD until 5/18/2020.

DHCS requested to send CalSAWS the list via sFTP so CalSAWS can post to the CalSAWS portal for counties to review.

DHCS will separate the lists into a separate list per county before transmitting to CalSAWS.

**Recommendation:** Post the list provided by DHCS to the CalSAWS web portal at the following location: CalSAWS CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CIV-107334

NOTE: The lists will not be reviewed nor tested by CalSAWS.

**Outreach Description:** DHCS will provide guidance to Counties

**Migration Impact Description:** list

**Migration Impact Analysis:** Request the list directly from DHCS.

**Alternative Procedure Description:**  
**Operational Impact:**  
**Estimate:** **10**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	5
CalHEERS :	5	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				

## [CIV-107277] Online Help: Update CFP - Family Stabilization

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>10</b>
Reporter:	<b>Joyce Oshiro</b>	Regulation Reference:		Created:	<b>05/14/2020 08:35 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Joyce Oshiro 05/18/2020 - Approve

**Expedite Approval:** Approved by Karen Rapponotti 5/18/2020

**Current Design:** The Family Stabilization C-IV Functional Presentation (CFP) includes cosmetic errors. See attached.

**Request:** Update the Family Stabilization CFP.

**Recommendation:** Update the Family Stabilization CFP.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Per DDID #1070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.

#### Migration Impact

No Impact

#### Analysis:

#### Alternative

None

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 10**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	10			Tech Ops :	0

## [CIV-107074] 2020 Medicare Savings Program Property Limit

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Rajan Vadapalli</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rajan Vadapalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>45</b>
Reporter:	<b>Nina Butler</b>	Regulation Reference:	<b>ACWDL 20-07</b>	Created:	<b>04/21/2020 08:32 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-215751</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Property limits for the Medicare Savings Program (MSP) were last updated in the LRS system for 2019.

The current MSP Property Limits are:

Property Limit - Single: \$7,730  
Property Limit - Couple: \$ 11,600

#### Request:

Effective January 1, 2020, this letter revises the Medicare Savings Program (MSP) property limit amounts to be used in determining eligibility.

The property limits used to determine MSP eligibility increased in 2020.

The 2020 MSP Property Limits are:

Property Limit - Single: \$7,860  
Property Limit - Couple: \$11,800

Federal law sets the MSP property limits at three times the SSI property limit plus an annual percentage increase equal to the increase in the Consumer Price Index.

New Property limits for the MSP have not been updated in the C-IV system and needs to be updated to 2020 amounts.

#### Recommendation:

1. Update code\_detl.catgry\_id="335" reference table to accommodate MSP Property limits effective 01/01/2020.
  - a) Update code\_num\_identif : "AG" Property Limit - Single value to \$7,860
  - b) Update code\_num\_identif : "AH" Property Limit - Couple value to \$11,800

2. Generate a list of cases that have a Medicare Premium Payment Program (MPPP) person who was denied or discontinued for over resources, but their property total was under the new value from 01/01/2020 through the date of implementation for this SCR.

List Name: Denied/Discontinued MPPP for over resources

The listing will consist of below columns -

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker
- Benefit Month

County Action: These cases failed MPPP property budgets from 01/2020 onwards using 2019 property limit values. The user will need to review the cases and process EDBC's, if needed.

**Outreach**

CIT for List

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the Medi-Cal/CMSMSP Committee. LRS will implement this change with SCR CA-215751 in the 20.09 release.

**Migration Impact**

**Analysis:**

**Alternative**

Override EDBC

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**45**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	30	CalHEERS Test :	15	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

## [CIV-107088] Update Last Month of Reversal for SSI Cash Out Population

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Mark Keehn</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Mark Keehn</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>62</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>Exec Order, ACL 18-90</b>	Created:	<b>04/21/2020 05:49 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Tyler Vaisau</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-215774</b>

### Non-Committee

#### Review:

**Expedite Approval:** Approval provided by Karen and Laura as this part of COVID-19 emergency

**Current Design:** Last month of SSI Cash out reversal is expected to be 10/2020.

**Request:** Given that Recertifications and SAR7s are not being actioned for March, April, and May of 2020, EDBC will not be reversing CF programs with SSI/SSP persons during those months. This means the auto creation of SNB and TNB programs will also be suppressed. EDBC will reverse these cases at the next SAR or RE. However, some of these reversals will occur after 10/2020, which was previously expected to be the last month for which it was possible to have a reversal.

#### Recommendation:

- Update the following sections of the system to use the new 'last possible reversal month' of 10/2021.
1. LRS/CalSAWS Only: Update the CF yellow banner logic to account for the last possible reversal month. The yellow banner is used to alert the user when a CalFresh program is eligible for an SSI/SSP reversal determination.
  2. Update the validation message and logic which is triggered on the CalFresh SSI/SSP Reversal Detail page to account for the last possible reversal month.
  3. Update Code Table 73 to extend the time period for which the 'Gets SSI/SSP' (CT73 - 25) Status Reason is available to account for the last possible reversal month.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

The user would use an earlier (but incorrect) SSI/SSP Reversal Month to avoid the validation message on the SSI/SSP Reversal Detail page.

#### Operational Impact:

**Estimate:** 62

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	14
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	34	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	14	Tech Arch :	0	Tech Ops :	0
Training :	0				



## [CIV-107435] Update C4Yourself Android Mobile App to support API level 29 or higher

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Pallavi Singh</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Jonathan Goldsmith</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>120</b>
Reporter:	<b>Pallavi Singh</b>	Regulation Reference:		Created:	<b>06/09/2020 12:32 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	
<b>Non-Committee Review:</b>	Approved by Karen R. on 6/9/2020				
<b>Expedite Approval:</b>	Approved by Karen R. on 6/9/2020				
<b>Current Design:</b>	C4Yourself mobile application uses Android SDK 10 (API level 28)				
<b>Request:</b>	By November 2, 2020, all apps that are being updated must target at least Android 10 (API level 29).				
<b>Recommendation:</b>	Build and release the C4Yourself mobile application with Android 10 (API level 29).				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	The Self-Service Portal is currently not in scope for migration as it is assumed that the approach for the YBN and C4Yourself Portals will be addressed prior to migration.				
<b>Migration Impact Analysis:</b>	SSP & Mobile App				
<b>Alternative Procedure Description:</b>	There is no alternate procedure, as without the update a new version of mobile cannot be released app post November 2, 2020.				
<b>Operational Impact Estimate:</b>	<b>120</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	30	Tech Arch :	90	Tech Ops :	0
Training :	0				

End SCRs



## [CIV-10791] Prevent Advancing Medi-Cal Renewal with a Soft Pause Individual

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Krishna Akula</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:	<b>Rajan Vadapalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>470</b>
Reporter:	<b>Elisa Miller</b>	Regulation Reference:	<b>ACWDL 17-35</b>	Created:	<b>12/29/2017 02:26 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>2020-05-11 00:00:00</b>	Other Agency Cross Reference:	<b>CA-58123</b>

### Non-Committee

#### Review:

**Expedite Approval:** Approved by JoAnne Osborn - 02/24/2020

#### Current Design:

When a MAGI Medi-Cal individual reports a change or is reevaluated during the annual renewal period, CalHEERS protects the individual from adverse actions to their MAGI Medi-Cal eligibility by placing the individual in Soft Pause. The annual renewal period begins two months prior to the RE Due Date until the program is renewed.

Soft Pause protects the individual until the County Eligibility Worker (CEW) evaluates the individual for MAGI Medi-Cal with a premium or for other Medi-Cal programs not subject to MAGI, such as Non-MAGI Medi-Cal or Consumer Protection Programs (CPPs).

CalHEERS Soft Pause protections will continue until Soft Pause is lifted by a CEW through an Eligibility Determination Request (EDR). Once Soft Pause is lifted, adverse actions can be applied per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual can be moved to another aid code or discontinued from MAGI Medi-Cal.

With CalHEERS Release 16.4, C-IV SCR 2713 and LRS SCR 36160 updated The Systems with functionality to allow a CEW to send a 'Soft Pause Lift' indicator to CalHEERS in an EDR. When CalHEERS receives the 'Soft Pause Lift' indicator, CalHEERS lifts Soft Pause and applies adverse actions per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual is moved to another aid code or discontinued from MAGI Medi-Cal. CalHEERS sends a MAGI Determination of Eligibility Response (DER) to The Systems with the individual's new MAGI Medi-Cal eligibility/discontinuance and the Eligibility Evaluation Reason code 'Soft Pause Lift'. The CEW can then move the individual to the new MAGI Medi-Cal aid code or evaluate the individual for Non-MAGI Medi-Cal.

C-IV Medi-Cal EDBC Batch skip logic will skip a case with skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause. C-IV generates through batch a Non-MAGI Screening Packet for any individual with Eligibility Evaluation Reason of 'Soft Paused' on the DER received during the Batch MAGI Renewal process. This allows the C-IV CEW to manually request the 'Soft Pause Lift' to determine the individual's correct benefits when the Non-MAGI Screening Packet is returned. CalSAWS does not have the Medi-Cal Batch EDBC Skip logic nor the batch to generate the Non-MAGI Screening Packet. CalSAWS CA-203981 added the Non-MAGI Screening Packet to the template repository in Release 19.11.

The Systems allow CEWs to run Medi-Cal EDBC against a MAGI Determination that contains an individual in Soft Pause and establish a new annual renewal period. When an individual is in Soft Pause, the MAGI Determination provides the updated income and household size information with incorrect Federal Poverty Level (FPL) limit. As a result, during MAGI Renewals, The Systems generates a MAGI Renewal Notice of Action (NOA) with the incorrect FPL amounts. This can be misleading to the individual.

C-IV allows the CEW to select the 'RE' EDBC Run Reason during the annual renewal period and outside the annual renewal period to establish a new renewal period when processing a reported change. In C-IV 'RE' EDBC Run Reason is displayed when EDBC benefit month is on or after the Re-Evaluation begin month.

CalSAWS allows a worker to select a Run Reason from the EDBC Run Reason dropdown only when running Medi-Cal EDBC for a single-month. In CalSAWS 'RE' EDBC Run Reason is displayed only if the benefit month is after the RE Due Date or if a 'RE' packet exists for the 'RE' Due month.

C-IV sends 'Renewal - manual renewal' (RM) EDR Run Reason to CalHEERS during the annual renewal period starting with the EDR Benefit Month two months prior to the RE Due Date and beyond.

For example: A Medi-Cal program has RE Due Date 06/30/2020.

Beginning with EDR benefit month 05/2020 and beyond, C-IV sends 'RM' EDR Run Reason until a new annual renewal period is established.

CalSAWS does not send 'RM' EDR Run Reason.

CalSAWS automatically sets the EDBC Run Reason to 'RE' if the EDBC Run Reason is left blank when all the following are true:

- The EDBC benefit month is equal to the month following the RE Due Date or the EDBC benefit month is equal to the come-up month.
- The appropriate RE packet was generated for the RE Due Month for the program.
- The latest RE packet status is either 'Not Applicable' or 'Reviewed-Ready To Run EDBC'

C-IV does not have functionality to automatically set the EDBC Run Reason to 'RE', but C-IV does have a page validation on the Run EDBC and Negative Action Detail pages that require the worker to run EDBC with 'RE' Run Reason when all the following are true:

- The latest MAGI determination for the benefit month has a 'RE' or 'RM' Run Reason.
- The benefit month is no earlier than one month prior to 'RE' due month.
- 'RE' Run Reason was not selected while running EDBC.
- Not an Auto Test scenario.

The MAGI Emulator allows testing of changes to The Systems that rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment. The MAGI Emulator does not have functionality to return Soft Pause or Soft Pause Lift in the MAGI Determination. See the current functionality of MAGI Emulator in Supporting Documents.

**Request:**

Per ACDWL 17-35, Medi-Cal individuals must be evaluated for Non-MAGI Medi-Cal if the individual was found MAGI Medi-Cal eligible with Soft Pause during the renewal process before advancing the renewal due date.

1. Require the CEW to lift Soft Pause prior to running Medi-Cal EDBC with 'RE' EDBC Run Reason.
2. Add a new EDBC Run Reason, 'Soft Pause/Non-RE', that will allow a CEW to run Medi-Cal EDBC during the annual renewal period with an individual in Soft Pause that will not advance the renewal due date. This 'Soft Pause/Non-RE' EDBC Run Reason should only be used for exceptions when the CEW is unable to lift Soft Pause due to 10-day noticing or CalHEERS issues. For example: a 'Person Add' during renewal or to process a Negative Action for a non-Soft Pause individual while waiting for the Non-MAGI Screening Packet for the Soft Pause individual.
3. Update CalSAWS Batch EDBC Skip logic to skip a case with a new skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause.
4. Update The Systems to generate a Non-MAGI Screening Packet when an individual is skipped through batch for Soft Pause and the MAGI Determination Run Reason code is 'Renewal - batch administrative renewal' (RE).
5. Update CalSAWS to create a Journal entry when the Non-MAGI Screening Packet is generated through batch.
6. Update CalSAWS to allow the CEW to select 'RE' EDBC Run Reason to establish a new renewal period during reported changes outside the annual renewal period.
7. Update CalSAWS to send 'RM' EDR Run Reason during the annual renewal period.
8. Update The Systems to automatically set the EDBC Run Reason to either 'RE' or 'Soft Pause/Non-RE' when appropriate during the annual renewal period.
9. Update the MAGI Emulator to have Soft Pause and Soft Pause Lift functionality to allow the testing of changes in The Systems which rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment.

**Recommendation:**

1. Update the Run EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program to prevent a CEW from advancing the renewal when an individual is Soft Paused.
2. Update the Negative Action Detail page to display 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program to prevent a CEW from advancing the renewal when an individual is Soft Paused.
3. Update Create Manual EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason.
4. Update the Medi-Cal EDBC Summary page to display a notification message when 'Soft Pause/Non-RE' Run Reason is auto-set during the Medi-Cal EDBC evaluation.

5. Add 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program. Update The Systems to auto-set the EDBC Run Reason to either 'Soft Pause/Non-RE' or 'RE' when appropriate.
6. Update eHIT Disposition functionality for the new EDBC Run Reason 'Soft Pause/Non-RE'. CalSAWS only: Update eHIT logic to have 'RM' EDR Run Reason functionality.
7. CalSAWS only: Add a Batch EDBC Skip Reason 'Soft Paused' that will skip a case from Batch EDBC processing when the valid DER has at least one individual with Eligibility Evaluation Reason of Soft Pause.
8. CalSAWS only: Update the Batch MAGI Renewal Sweep to exclude cases from processing through Batch MAGI if the worker has already initiated the MAGI Renewal manually (RM) from the online page.
9. Create a new batch job for CalSAWS and update the existing batch job for C-IV to only generate the Non-MAGI Screening packet through batch for cases which are skipped during Batch EDBC with the reason of Soft Pause. CalSAWS only: Add a journal entry when the Non-MAGI Screening packet is generated through batch.
10. Update the MAGI Emulator to return MAGI Determinations with Soft Pause and Soft Pause Lift. The MAGI Emulator is used for testing purposes only to emulate the results returned from CalHEERS on a MAGI Determination.
11. Regression test the DHCS Renewals Master Request reports for the updated manual renewal EDR run reason functionality.

See CA-58123\_CIV-10791\_SoftPause during RE.docx for detailed design.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

CalSAWS will implement this Change with SCR CA-58123 in the 20.06 release.

Reject NOA and create a manual one.

**470**

Automated Test :	20	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	275	CalHEERS Test :	125	Client Correspondence :	50
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

1. Recommendation Change:

**Description-1:**

A. Updated 'Soft Pause/Non-RE' EDBC Run Reason to display at all times in the EDBC Run Reason dropdown for Medi-Cal Program.

Before:

2.1.3.2. and 2.2.3.2. Display 'Soft Pause/Non-RE' in the EDBC Run Reason drop down for the Medi-Cal program when the valid MAGI Determination for the benefit month has at least one individual on the program with Eligibility Evaluation Reason of Soft Pause.

After:

2.1.3.2. and 2.2.3.2. Display 'Soft Pause/Non-RE' in the EDBC Run Reason drop down for the Medi-Cal program.

B. Update auto-set of EDBC Run Reason to 'RE' for Non-MAGI Turning 65 Packet

The Non-MAGI Turning 65 Packet was included in the recommendations with the rest of the Medi-Cal Renewal packets; however, since the Non-MAGI Turning 65 Packet should only be considered for auto-setting of 'RE' when there is no other Medi-Cal Renewal Packet for the MC program for the same time frame, the Non-MAGI Turning 65 Packet was removed from those sections and now has its own section.

Also, auto-set of 'RE' for Non-MAGI Turning 65 Packet functionality was added to LRS/CalSAWS with CA-203981 in Release 19.11. The Current Design was updated to state this and Recommendations 2.5.2.2.B.b and 2.5.2.2.D.b describe the changes needed for LRS/CalSAWS specifically.

Before:

2.5.2.2.A and 2.5.2.2.B included Non-MAGI Turning 65 Packet.

After:

2.5.2.2.A does not include Non-MAGI Turning 65 Packet.

2.5.2.2.B is a new section specific to only Non-MAGI Turning 65 Packet.

2.5.2.2.C was previously 2.5.2.2.B and does not include Non-MAGI Turning 65 Packet.

2.5.2.2.D is a new section specific to only Non-MAGI Turning 65 Packet.

2.5.2.2.E was previously 2.5.2.2.C. No change to recommendation other than number.

2. ETC Change:

Before:

CalHEERS ETC: 225

CalHEERS Test ETC: 105

After:

CalHEERS ETC: 275

CalHEERS Test ETC: 145

3. Release Change:

N/A

Pending CCB

**Content Revision  
Status-2:  
Content Revision  
Description-2:**

1. Recommendation Change:

A. Update to design to remove from criteria of auto-setting the EDBC Run Reason to 'RE' when a RE Packet status is "Not Applicable"

Before:

Current Design:

CalSAWS automatically sets the EDBC Run Reason to 'RE' if the EDBC Run Reason is left blank when all the following are true:

- The EDBC benefit month is equal to the month following the RE Due Date or the EDBC benefit month is equal to the come-up month.
- The appropriate RE packet was generated for the RE Due Month for the program.
- The latest RE packet status is either 'Not Applicable' or 'Reviewed-Ready To Run EDBC'

Sections 2.5.2.2.A.e.i, 2.5.2.2.C.f.i, 2.5.2.2.E.e.i include 'Not Applicable' status in the auto-set criteria

After:

Current Design:

CalSAWS automatically sets the EDBC Run Reason to 'RE' if the EDBC Run Reason is left blank when all the following are true:

- The EDBC benefit month is equal to the month following the RE Due Date or the EDBC benefit month is equal to the come-up month.
- The appropriate RE packet was generated for the RE Due Month for the program.
- The latest RE packet status is 'Reviewed-Ready To Run EDBC'
- The Non-MAGI Turning 65 Packet submit month equals the Medi-Cal EDBC benefit month and the latest Non-MAGI Turning 65 Packet status is 'Reviewed - Ready to Run EDBC' if there does not exist any Medi-Cal RE packet for the RE due month for the program in Release 19.11 with CA-203981.

Sections 2.5.2.2.A.e.i, 2.5.2.2.C.f.i, 2.5.2.2.E.e.i do not include 'Not Applicable' status in the auto-set criteria

B. In section 1.4, added assumption 4 to document a DHCS decision regarding The Systems sending Non-MAGI Screening Packets for a specific population CalHEERS determined in Soft Pause.

C. In section 2.7.2, added note to inform that Batch EDBC skips display on the Batch Eligibility Report.

D. In Section 2.9.2, added note to clarify packet generation when there are multiple packets and or multiple eligibility statuses on the MAGI Determination.

E. In Section 2.1.3 Added a condition how we display the 'RE' Run Reason on Run EDBC page : "Do not display 'RE' Run Reason in the drop down if the valid DER to be used by EDBC for this Medi-Cal program contains at least one Soft Pause individual".

See Content Revision 2 design document attached to JIRA for details.

2. ETC Change:

Before:

CalHEERS ETC: 275

CalHEERS Test ETC: 145

After:

CalHEERS ETC: 295

CalHEERS Test ETC: 155

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

## [CIV-4400] Add General Assistance (Managed) Program NOAs and Forms

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Daniel J Rosales</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Tiffany Huckaby</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>522</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>12/29/2017 02:24 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>2020-03-26 00:00:00</b>	Other Agency Cross Reference:	

### Non-Committee

**Review:**

**Expedite Approval:** Approved - Karen Rapponotti 4/8/2020

**Current Design:** General Assistance (Managed) program functionality was added in Release 16.07 with SCR # 1093. Notices of Action (NOAs) were not part of the General Assistance (Managed) program functionality when it was released.

**Request:** Counties have prioritized 'NOAs' (Ability to send out Notices for Approvals, Denials, Benefit Change, Issuance Method Change, etc.) as their #3 enhancement to the General Assistance (Managed) program.

This has been separated into two Phases:

- Phase 1 SCR CIV-4400 - Adds the Approval NOA, Denial NOA, Discontinuance NOA, Benefit Change NOA, Supplement NOA, Reimbursement Agreement Form, Periodic Reporting Form.
- Phase 2 SCR CIV-106555 - Adds the Issuance Method Change NOA, GA Time Limit NOA, Supportive Services NOA, GA Timing Out NOA, GA Aid Code change, GA Reimbursement Form, GA Overpayment NOA

### Recommendation:

1. Add the following notices and forms to the Template Repository in English and Spanish. Please see the attached mock ups for details.
  - a. GA Approval NOA
  - b. GA Denial NOA
  - c. GA Discontinuance NOA
  - d. GA Benefit Change NOA
  - e. GA Supplemental NOA
  - f. GA Periodic Report Form
  - g. GA Reimbursement Agreement Form
2. Add a Spanish version of the GA NA Back 9 for the NOAs in Recommendation 1.

### Outreach

**Description:**

**Migration Impact Description:** The C-IV GA Solution including the GA NOAs/Forms will be migrated as part of DDCR 10002.

**Migration Impact Analysis:**

**Alternative Procedure Description:** Generate a Blank GA NOA from template repository.

### Operational Impact:

<b>Estimate:</b>	<b>522</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	320
DBA :	0	Design :	70	Eligibility :	0
Fiscal :	0	Imaging :	5	IVR/CC :	0

Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	82	Tech Arch :	0	Tech Ops :	0
Training :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change:

Before:

The assumption regarding the 'Print' button in C-IV does not exist.

After:

Assumption 'C-IV: 'Print' button will always be available on all the forms.' has been added.

Note: Supporting document 'C-IV 4400 GA NOA translations' has been updated to correct a typo.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:** 1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision Status-3:**

**Content Revision Description-3:** 1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision Status-4:**

**Content Revision Description-4:** 1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:



# [CIV-106413] Lobby Mgmt: Update Lobby Dashboard to include Responsive Voice API Key

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Rajesh Rudra</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Jonathan Goldsmith</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>60</b>
Reporter:	<b>Jonathan Goldsmith</b>	Regulation Reference:		Created:	<b>02/13/2020 10:34 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:**

Approved by Karen R. on 4/7

**Expedite Approval:**

Approved by Karen R. on 4/7

**Current Design:**

Lobby Dashboard uses third party vendor Responsive Voice for calling out numbers.

**Request:**

Responsive Voice will be requiring that all calls made to the vendor include an API key. The vendor has not given a current date that this change needs to be completed by, but mentioned that at some future time they will stop supporting calls without this API key.

**Recommendation:**

Update Lobby Dashboard Responsive Voice calls to include the API key.

**Outreach**

**Description:**

**Migration Impact**

Will be incorporated with DDCR 5044 CA-201485

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **60**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	10	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	10	Tech Arch :	40	Tech Ops :	0
Training :	0				

**Content Revision Status-1:**

Pending CCB

**Content Revision Description-1:**

1. Recommendation Change:  
N/A

2. Estimate Change:  
N/A

3. Release Change:  
Before: 20.07



After: 20.09

4. Funding Source Change:  
N/A

**Content Revision  
Status-2:  
Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:  
Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:  
Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

## [CIV-12446] CA 812 Collection Reports Claim Adjustments

Team Responsible:	<b>Reports</b>	Assignee:	<b>Robert Logan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>424</b>
Reporter:	<b>Sarbjeeet Chana</b>	Regulation Reference:		Created:	<b>12/29/2017 02:26 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[State/Fiscal Reports]</b>	Approved by Committee:	<b>2020-03-17 00:00:00</b>	Other Agency Cross Reference:	<b>CA-52597</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The CA 812 and the CA 812 Detailed Backup Reports are generated as two separate reports. This causes users the need to open both reports and go back and forth between them when validating information. The CA 812 Detail Sheets are also limited in the number of data fields it provides to help county workers validate information reported on the CA 812. Recovery Accounts that are in pending status and have no transactions posted to them at the beginning of the reporting quarter and become 'Void' at the end of the reporting quarter are known as same quarter void Recovery Accounts. Same quarter void Recovery Accounts should not be reported on the CA 812 state report. The Line 8c – New Void Overpayments backup detail sheet lists transactions that are posted to same quarter void Recovery Accounts. This sheet is only there for informational purposes. Cash and Tax intercept transactions are being reported as adjustments due to the transactions not being mapped to Line 4a and Line 4b. The transaction amount/claim by month totals on the detail sheets of lines 3a, 3b, 4a and 4b are not calculating based on how transactions are captured on the report. The CA 812 is not properly reporting Recovery Accounts in the LRS/CalSAWS specific status of 'Pending Approval'.

#### Request:

1. Update the CA 812 report to improve the data validation process.
2. Move some transaction types currently reported as other adjustments to the appropriate transaction lines.
3. Treat Recovery Accounts in 'Pending Approval' status similarly as the 'Pending' status.

#### Recommendation:

1. Combine the CA 812 State report and the CA 812 Detailed Backup report to a single CA 812 report.
2. Create a detailed backup sheet for Line 1b - Adjustments to Item 1a.
3. Add new fields to existing detail sheets.
4. Map cash and tax intercept transactions, currently being reported on Line 8c, to Lines 4a and 4b.
5. Update the logic for transaction amount/claim by month totals on the detail sheets of lines 3a, 3b, 4a and 4b. The 'Other' transaction amount/claim totals will be removed.
6. Remove the entire Line 8c – New Void Overpayments detail sheet.
7. Update the CA 812 logic to treat Recovery Accounts in 'Pending Approval' status the same as if the account was in 'Pending' status.
8. Update the report layout to adhere to reporting cosmetic standards.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the State/Fiscal Reports Committee. CalSAWS will implement this Change with SCR CA-52597 in the 20.09 release.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

The information can be obtained via Ad-Hoc

#### Operational Impact:

Estimate: **424**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0

DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	329	Reports Test :	95	Support :	
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change: {Description of Recommendation Change}  
 Before: The design did not include an explanation of why the report template was not being updated per ACL 19-05. The transaction total and claim total summary counts located on the detail sheets of lines 3a, 3b, 4a, 4b were not up to date with the summary sheet logic. The TI – IRS (17.5% State) and TI – IRS (17.5% County) transaction types are categorized as Misc. rather than tax intercept collections.  
 After: The design includes a note explaining that committee agreed to not update the template per ACL 19-05. The summary totals found on the detail sheet of Line 3a, 3b, 4a and 4b have been updated to reflect the Summary sheet logic. The TI – IRS (17.5% State) and TI – IRS (17.5% County) transaction types have been mapped to Line 4b – Tax Intercept Collections.

2. ETC Change: N/A

3. Release Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

1. Recommendation Change: {Description of Recommendation Change}  
 Before:  
 After:

2. ETC Change: {Description of ETC Change}  
 Before:  
 After:

3. Release Change: {Description of Release Change}  
 Before:  
 After:

**Content Revision Status-3:**

**Content Revision Description-3:**

1. Recommendation Change: {Description of Recommendation Change}  
 Before:  
 After:

2. ETC Change: {Description of ETC Change}  
 Before:  
 After:

3. Release Change: {Description of Release Change}  
 Before:  
 After:

**Content Revision Status-4:**

**Content Revision Description-4:**

1. Recommendation Change: {Description of Recommendation Change}  
 Before:  
 After:

2. ETC Change: {Description of ETC Change}  
 Before:  
 After:

3. Release Change: {Description of Release Change}

## [CIV-104879] ACIN I-44-19 Update State PINS to 8 digits

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Ishrath Khan</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>287</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:	<b>ACIN I-44-19</b>	Created:	<b>08/20/2019 11:04 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:	<b>2020-04-14 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-210119</b>

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** CURRENT CECRIS PIN FORMAT  
Program Identifier Number (PIN) Code:  
The three-digit PC is part of a six-digit PIN code that consists of a three-digit PC, a one digit Time Study Component ID (this is a 0 if the PC does not have a time study component), and a two-digit Type Of Expense (TOE) code.

The current PIN code structure is (example 315124):  
315 Program Code (PC)

- 1 Time Study Component ID
- 24 Type Of Expense Code (TOE)

**Request:** NEW CECRIS PIN FORMAT  
Program Identifier Number (PIN) Code:  
The new CECRIS PIN code will expand to an 8-digit code that consists of a four-digit PC, a one-digit Time Study Component ID and a three-digit TOE code.

The new PIN code structure will be (example 03151024)  
0315 Program Code (PC)

- 1 Time Study Component ID
- 024 Type Of Expense Code (TOE)

The Time Study code will consist of the four-digit PC and the one-digit Time Study Component ID. (03151 in the example above)

### SCHEDULE FOR CHANGES

All counties shall modify their local county systems to meet the state automated County Expense Claim Reporting System (CECRIS) new PIN structure. All counties will need ACIN I-44-19 to ensure their systems can accommodate the new PIN structure by December 2020. A separate county letter regarding funding will be distributed by CDSS.

### Recommendation:

1. Update Auditor Controller interface file and warrant print writer XML definition to increase the State Pin field length from 6 to 8 characters.
2. Send the following test file to the counties:
  - a. Auditor Controller file
  - b. Warrant print Writer file for Migration counties
3. Update the Reports that contain the State PIN Number to accommodate the new 8-digits.

Note: San Bernardino, Merced, Stanislaus, and LA county are not impacted by this change as these counties maintain their own accounting strings.

**Outreach**

**Description:**

**Migration Impact**

DDID 319 will migrate Pay Codes and Fund Codes for C-IV Migration Counties with Release 20.07. LRS SCR CA 210119 will implement this functionality in the CalSAWS system.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**287**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	187	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	14	Support :	0
System Test Support :	56	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

1. Recommendation Change: N/A

**Description-1:**

2. Estimate Change:  
Before: Fiscal ETC -187  
After: Fiscal ETC - 92

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

1. Recommendation Change:

**Description-2:**

Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision**

**Status-3:**

**Content Revision**

1. Recommendation Change:

**Description-3:**

Before:  
After:

2. Estimate Change:  
Before:  
After:

**End Content Revisions**



## [CA-212389] Add new navigation links/pages (financials) on CalSAWS website

Team Responsible:	<b>Release Communication</b>	Assignee:	<b>Tiffany Cheung</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Tiffany Cheung</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.06.xx</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>8</b>
Reporter:	<b>Tiffany Cheung</b>	Regulation Reference:		Created:	<b>12/13/2019 11:02 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>June Hutchison</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by June Hutchison on 6/8/2020.				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	Currently on the website, these are the available navigation links under the global navigation link 'About Us':				
	<ul style="list-style-type: none"> <li>• Leadership</li> <li>• Counties</li> <li>• History</li> <li>• Project Locations</li> <li>• Public Information</li> </ul>				
<b>Request:</b>	There is no Contracts/Financials page.				
	Add new navigation link on the CalSAWS Website (calsaws.org) for Contracts/Financials under the global navigation link 'About Us' in the "Public Information" section:				
	<ul style="list-style-type: none"> <li>• Leadership</li> <li>• Counties</li> <li>• History</li> <li>• Project Locations</li> <li>• Public Information <ul style="list-style-type: none"> <li>• Contracts/Financials</li> </ul> </li> </ul>				
<b>Recommendation:</b>	Add new navigation link on the CalSAWS Website (calsaws.org) for Contracts/Financials under the global navigation link 'About Us' in the "Public Information" section:				
	<ul style="list-style-type: none"> <li>• Leadership</li> <li>• Counties</li> <li>• History</li> <li>• Project Locations</li> <li>• Public Information <ul style="list-style-type: none"> <li>• Contracts/Financials</li> </ul> </li> </ul>				
	Create a new Contracts/Financials page so users can subscribe to it.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	No migration impact as the changes outlined in this SCR do not impact the LRS or C-IV systems. This SCR updates the CalSAWS website (calsaws.org).				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					

<b>Estimate:</b>	<b>8</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	8
Reports :	0	Reports Test :	0	Support :	
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0





# [CA-214605] Turn on GR Discontinuance job and Cancel Customer Activities

Team Responsible:	<b>Online</b>	Assignee:	<b>Getnet Beyene</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.07.15</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>196</b>
Reporter:	<b>Girish Chakkingal</b>	Regulation Reference:	<b>GR CER</b>	Created:	<b>03/23/2020 01:43 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

**Review:**  
**Expedite Approval:** Expedited Approval provided by Karen J. Rapponotti and JoAnne Osborn on March 16 2020 for all emergency COVID-19 SCRs

**Current Design:** Currently in CalSAWS due to COVID-19, GA/GR Discontinuance and Time limits Batch jobs are disabled from the scheduler. Also, GROW Program and GROW Activities are in Non-Compliance status.

**Request:** As per the direction from LA County, the disabled GA/GR Discontinuance and Time limits batch jobs should be enabled and Cancel Customer Activities to PASS the GA/GR Program from August 2020 forward.

### Recommendation:

- 1) Batch Ops:
  - Update the scheduler to enable the GA/GR Discontinuance and Time limits Batch jobs that are currently disabled effective for the month August 2020 forward.
  - "Various GR Discontinuance sweeps:
    - JB00E166M
    - JB00E173M
    - JB00E184M
    - JB00E185M
    - JB00E186M
    - JB00E187M
    - JB19E442M"
    - JB00E197D - GR Timelimit Disc - Daily
    - JB00E168M - GR Timelimit Disc Monthly
- 2) Online:
  - I) Apply DCR's to Cancel Customer Activities to not discontinue the Cases that are failing with the below reasons
    - a(i) Failed to show to Orientation Appointment
    - a(ii) Failed to attend CMA Appointment
  - b) Customer Activities impacted records criteria:
    - (i) Identify all Customer Activity records for Active GA/GR Programs with "Customer Activity Detail Type: 'Orientation' or 'Case Manager Appointment' ", "Category: GROW", "Program Type: GROW" and "Status Reason: 'No Show' or 'Non-Compliance Occurred' " after the Current GA/GR Application Date.
    - (ii) For the above identified records, all these records need to be end dated with 1 day prior to the System Date and new record to be inserted with "Status: Closed" and "Status Reason: Activity Cancelled" with the System Date as Begin Date.
  - II) Apply DCR to update the GROW Program status for the above identified cases from 2.b(i).
    - a(i) Identify the GROW Programs for the 'Customer Activity Detail Type: Orientation' with 'Status: Non-Comp' and 'Status Reason: FO – Failed to keep Orientation'
    - a(ii) Identify the GROW Programs for the 'Customer Activity Detail Type: Case Manager Appointment' with 'Status: Non-Comp' and 'Status Reason: CA - Failed to keep Case Manager Appointment'

b) For these programs in II.a(i) and II.a(ii), end date the Non-Comp status with 1 day prior to the System Date and insert the GROW Program Status to its previous Status with the System Date as Begin Date.

Note: Don't touch the worker and leave the current worker if assigned and if not leave blank as is.

3. Online:

Create a Journal Entry with the following details once the Customer Activities are updated.

- a. 'Journal Category' - Employment Services
- b. 'Journal Type' - Activity
- c. 'Short Description' - Customer Activities
- d. 'Long Description' - Per direction from LA County, Customer Activities are Closed and/or Cancelled due to COVID-19.
- e. 'Created By' - 92
- f. 'Updated By' - 92

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

This change is applicable only to LA County GA/GR Program.

GA/GR Cases need to be discontinued by the GR workers manually.

**196**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	43
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	83	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	
System Test Support :	50	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



# [CA-216502] Enable GR Discontinuance in EDBC from August month forward

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Henry Thamas</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.07.15</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>76</b>
Reporter:	<b>Srinivasa Meenavalli</b>	Regulation Reference:	<b>GR CER</b>	Created:	<b>05/19/2020 06:09 PM</b>
Status:	<b>Development Complete</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Expedited Approval provided by Karen J. Rapponotti and JoAnne Osborn on March 16 2020 for all emergency COVID-19 SCRs

#### Current Design:

Currently in CalSAWS due to COVID-19, a new rule in EDBC (Online/Batch) is introduced to update the Regular EDBC to read only EDBC with a read only reason of COVID-19 from April 2020 month when all the following criteria is met

1. At least one the of the active person in the GR program gets discontinued in the EDBC rules with any reason except the below ones
  - a. Gets CAPI
  - b. Gets SSI
  - c. Gets SSI/SSP
  - d. Deceased

This is introduced thru the SCR CA-214539.

#### Request:

Enable the GR Discontinuance from August 2020 forward as it was prior to the COVID-19. For the months April, May, June and July the "Ready Only" EDBC should still be available when retro EDBC is ran.

#### Recommendation:

- 1) Update the GR Discontinuance EDBC "Read Only" rule in include "Ineligible" status to continue the "Ready Only" EDBC for the retro EDBC runs for the months of April, May, June and July 2020.
- 2) End date the CTCR 10581 table entries with July month end date which will enable the GR Discontinuance from August 2020 forward as it was prior to the COVID-19.

#### Outreach

##### Description:

##### Migration Impact

##### Description:

This change is applicable only to LA County GA/GR Program.

##### Migration Impact

##### Analysis:

##### Alternative

##### Procedure

##### Description:

GA/GR Cases need to be discontinued by the GR workers manually.

##### Operational Impact:

**Estimate: 76**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	52
Fiscal :	0	Imaging :	0	IVR/CC :	0

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Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	19	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



# [CA-216634] Post CalHEERS UIB Clean-up list to CalSAWS portal

- Resolved: 06/10/2020 09:49 AM

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Ryan O'Mary</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.06.03</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>10</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>05/22/2020 03:17 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Documentation</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-107334</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Karen Rapponotti on 3/16/2020

**Expedite Approval:** Approved by Karen Rapponotti on 3/16/2020

**Current Design:** CalHEERS Portal did not have a way to differentiate regular Unemployment Insurance Benefits (UIB) from the Pandemic Unemployment Compensation (PUC) until 5/18/2020. PUC is not countable for the MAGI Medi-Cal program, but it is countable for the Covered California Programs.

**Request:** DHCS requested CalHEERS to export a list of CalHEERS cases where at least one person entered UIB in their application on the CalHEERS portal and were found to be MAGI Ineligible from when the PUC was issued from EDD until 5/18/2020.  
  
DHCS requested to send CalSAWS the list via sFTP so CalSAWS can post to the CalSAWS portal for counties to review.

DHCS will separate the lists into a separate list per county before transmitting to CalSAWS.

**Recommendation:** Post the list provided by DHCS to the CalSAWS web portal at the following location: CalSAWS CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-216634

NOTE: The lists will not be reviewed nor tested by CalSAWS.

**Outreach Description:** DHCS will provide guidance to Counties

**Migration Impact Description:** No migration impact as this SCR is only to provide a case listing in SharePoint.

**Migration Impact Analysis:** Request the list directly from DHCS.  
**Alternative Procedure Description:**

**Operational Impact:**  
**Estimate:** 10

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	5
CalHEERS :	5	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0

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System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				



## [CA-216787] Advance GR AA Due Month and Update Customer reporting records for GR QR7, AA and SSP14

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Henry Thamas</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.07.15</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>259</b>
Reporter:	<b>Srinivasa Meenavalli</b>	Regulation Reference:	<b>GR CER</b>	Created:	<b>05/29/2020 02:28 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee Review:

**Expedite Approval:** Expedited Approval provided by Karen J. Rapponotti and JoAnne Osborn on March 16 2020 for all emergency COVID-19 SCR's

**Current Design:** Due to COVID-19, GR AA/SSP14 and QR7 forms are mailed out to customers for the due month June 2020. The GR intake SSP14 forms are sent out to customers and GR AA SSP14 forms are generated and canceled Central Print for 03/2020 thru 05/2020.

**Request:** A new 12 moth GR AA due date must be established. Status of GR AA and QR7 should be updated to flow the statuses through 'Complete - EDBC Accepted' and Update SSP14 forms as received.

### Recommendation:

1. Perform a one-time data change when the following conditions exist:
  - a. There is a GR program with an Annual Agreement (AA) Due Date 06/2020.
  - b. The Re-determination record Completion Date is null date.
  - c. The program status is Active or Ineligible for the month of the Re-determination Due Date.
  - d. The program status is Active or Ineligible for the month immediately following the Re-determination Due Date.

Perform the following actions:

- a. Set the Completion Date to the current system date
- b. Set the Completion Reason to 'Data Change' (CT 1892 - DC)
- c. Generate a new Re-determination record with the following values:
  - i. Set Program ID to match Program ID of previous record
  - ii. Set Begin Date to the day after the previous record Due Date
  - iii. Set the Due Date to the last day of the month such that the RE period advances to 12 months
  - iv. Set Completion Date to null date

Note: Completion Reason will remain null.

2. Update the status of GR AA and QR7 packets with the submit month 06/2020 based on the following criteria if the latest status of these packets is not 'Complete - EDBC Accepted', 'Not Applicable' or 'Error'.

- a. Update Customer Reporting statuses in the following order if the latest status of the Packets is 'Generated'
  - i. Sent
  - ii. Received
  - iii. Reviewed- Ready to Run EDBC
  - iv. Complete- EDBC Accepted

- b. Update Customer Reporting statuses in the following order if the latest status of the Packets is 'Sent'
  - i. Received
  - ii. Reviewed- Ready to Run EDBC

- iii. Complete- EDBC Accepted
- c. Update the Customer Reporting statuses in the following order if the latest status of the Packets is 'Received'
  - i. Reviewed- Ready to Run EDBC
  - ii. Complete- EDBC Accepted
- d. Update the Customer Reporting statuses in the following order if the latest status of the Packets is 'Incomplete'
  - i. Received
  - ii. Reviewed- Ready to Run EDBC
  - iii. Complete- EDBC Accepted
- e. Update the Customer Reporting status in the following order if the latest status of the Packets is 'Reviewed- Ready to Run EDBC'
  - i. Complete- EDBC Accepted
- 3. Perform the below to mark the status of intake and AA SSP14 forms as Received that are in Generated or Sent Status for the forms that are due in the months of 03/2020 thru 06/2020.
  - a. Insert CUST\_RPT\_PGM\_TYPE\_DETL in the following order if the latest status of the Packets is 'Generated'.
    - i. Sent
    - ii. Received
  - b. Insert CUST\_RPT\_PGM\_TYPE\_DETL in the following order if the latest status of the Packets is 'Sent'.
    - i. Received
- 4. Create a Journal Entry with the following details once the Customer Reporting status is updated to 'Complete - EDBC Accepted'
  - a. 'Journal Category' for all the GR AA, SSP14, QR7 Packets - All
  - b. 'Journal Type' for all the GR AA, SSP14, QR7 Packets - Document
  - c(i). 'Short Description' for GR AA Packet - GA/GR AA Packet
  - c(ii). 'Long Description' for GR AA Packet - Per direction from LA County, GA/GR AA Packets has been marked Complete and a new 12-month agreement period was given due to COVID-19.
  - d(i). 'Short Description' for GR QR7 Packet - GA/GR QR7 Packet
  - d(ii). 'Long Description' for GR QR7 Packet - Per direction from LA County, GA/GR QR7 Packets has been marked Complete due to COVID-19.
  - e(i). 'Short Description' for GR SSP14 Packet - GA/GR SSP14 Packet
  - e(ii). 'Long Description' for GR SSP14 Packet - Per direction from LA County, GA/GR SSP14 Packets has been marked Received due to COVID-19.
  - f. 'Created By' - LRS System
  - g. 'Updated By' - LRS System

**Outreach**

**Description:**

This change is applicable only to LA County GA/GR Program.

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

GR AA, QR7 and SSP14 packets need to be processed by the worker manually.

**Operational Impact:**

**Estimate:**

**259**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	112
DBA :	0	Design :	0	Eligibility :	55
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0



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Reports :	0	Reports Test :	0	Security :	0
System Test Support :	67	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CA-216886] To disable/turn off the GROW Orientation and CMA Appointment jobs.

- Resolved: 06/03/2020 04:34 PM

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Ronak Bhatt</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.06.03</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>17</b>
Reporter:	<b>Srinivasa Meenavalli</b>	Regulation Reference:	<b>GR CER</b>	Created:	<b>06/03/2020 10:50 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee

### Review:

**Expedite Approval:** Expedited Approval provided by Karen J. Rapponotti and JoAnne Osborn on March 16 2020 for all emergency COVID-19 SCRs

**Current Design:** CalSAWS includes daily batch processing jobs to automatically run and schedule GROW Orientation and CMA Appointments for GR cases.

**Request:** Due to COVID-19, LA County is requesting CalSAWS to turn off the daily batch processing jobs to automatically run and schedule GROW Orientation and CMA Appointments for GR cases.

**Recommendation:** This request is turn off Daily GROW Orientation and CMA Appointments schedule batch jobs for GR cases

Job Id - PB19C910  
Frequency - Daily  
Description - GROW Orientation Activity schedule job  
This batch sweep will create GROW Orientation Appointments/Activity for eligible GR persons.

Job Id - PB19C905  
Description - GROW CMA Appointments schedule job  
Frequency - Daily  
This batch sweep will create GROW CMA Appointments for eligible GR persons.

## Outreach

### Description:

**Migration Impact Description:** This change is applicable only to LA County GA/GR Program.

### Migration Impact Analysis:

#### Alternative

#### Procedure

### Description:

### Operational Impact:

#### Estimate:

**17**

Automated Test :	0	Batch/Interfaces :	5	Batch Operations :	10
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0

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System Test Support :	2	Tech Arch :	0	Tech Ops :	0
Training :	0				

# [CA-216325] [Analytics] Release D Reports Re-Platform

- Resolved: 06/09/2020 08:50 AM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Stephen Hilliard</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.06.30</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>8160</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>05/12/2020 04:07 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 02/12/2020.

**Expedite Approval:** Laura Chavez 02/12/2020

**Current Design:** Release D Reports are currently pulling the information from OBIEE.

**Request:** Release D Reports will be displayed in Qlik Sense format.

**Recommendation:** It is recommended that Release D Reports pull the information from Qlik.

This is the SCR for the Soft Launch only:

- The links are only available to County validation testers, and are not available to all County users
- County validation testers will go to the Qlik Sense Hub (Newstand)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** **8160**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	8160	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				

 **[CA-216933] Training Release 20.07 - Training Environment Support**

Team Responsible:	<b>Training</b>	Assignee:	<b>Adrian Silva</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.07.24</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>60</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>06/04/2020 02:35 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on June 04, 2020

**Expedite Approval: Current Design:** Currently, there is no SCR for Training Environment support/maintenance for the 20.07 release.

**Request:** Provide/conduct Training Environment support/maintenance activities for the 20.07 release. LMS support activities for the release will be tracked through separate Training SCRs.

**Recommendation:** Provide 20.07 release support for the following activities:

-Training environment maintenance: Major release deployments, data refreshes, case copy, case and login creation upon request, etc.

**Outreach Description:**  
**Migration Impact Description:** There is no migration impact. This SCR allows for providing/conducting maintenance activities related to the DPSS Academy Training Environment.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None.

**Operational Impact: Estimate:** **60**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	60				



# [CA-202684] ACL 18-50 - Implement Redesigned CalFresh Overissuance NOAs - Phase 1

1

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Maria Jensen</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>James Tran</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>233</b>
Reporter:	<b>Ricardo Olivo</b>	Regulation Reference:	<b>ACL 18-50 and ACL 18-50E (Errata)</b>	Created:	<b>05/16/2018 11:31 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>05/22/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee Review:

**Expedite Approval:** Karen Rapponotti - 6/15/2020

**Current Design:** The CalFresh Overissuance NOAs are being generated automatically in LRS. They are also available through the template repository. These are NOAs that are coded as forms.

**Request:** ACL 18-50 - Implement Redesigned CalFresh Overissuance NOAs as requested by the State

The forms will be editable for the 57 counties and remain non-editable for Los Angeles County

### Recommendation:

This effort has been split into two SCRs. For this SCR, please implement the the following newly redesigned CalFresh Overissuance NOAs provided by the State described below. Include English, Spanish, and Threshold versions if available:

- CF 377.7B - CF Overissuance NOA for Inadvertent Household Errors (IHE).
- CF 377.7D3 - CF Overissuance NOA for County Administrative Error (AE).
- CF 377.7B1 - CF Repayment Final Notice for Inadvertent Household Errors (IHE).
- CF 377.7D2 - CF Repayment Final Notice for County Administrative Error (AE).

Please refer to Phase 2 of this set of changes, CA-214084, for the following NOAs:

- CF 377.7F - CF Overissuance NOA for change from Inadvertent Household Error (IHE) to Intentional Program Violation (IPV).
- CF 377.7F1 - CF Repayment Final Notice for Intentional Program Violation (IPV).
- DFA 377.7F - CF Overissuance NOA for Intentional Program Violation (IPV).

### Outreach

#### Description:

#### Migration Impact

#### Description:

The changes mentioned in the design will only be available in CalSAWS/LRS. C-IV will receive the new and updated forms at migration.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

For updated forms, generate the previous version of the form. For new forms, counties may access the forms from the CDSS website.

#### Operational Impact:

#### Estimate:

**233**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

CalHEERS :

0

CalHEERS Test :

0

Client Correspondence :

152

DBA :

0

Design :

0

Eligibility :

0

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Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	61	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

 **[CA-205915] Upgrade iText PDF and Imaging library**

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Abel Lopez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:		Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>360</b>
Reporter:	<b>Chris Larson</b>	Regulation Reference:		Created:	<b>12/07/2018 11:04 AM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-102915</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Laura Chavez on 6/12/2020

**Expedite Approval: Current Design:** The LRS system is using iText version 2.1.7

The following operations are supposed by iText in the LRS:

- Generate and attach barcodes to PDF
- Add JavaScript to PDF
- Retrieve number of pages on a PDF
- Retrieve the content of a PDF
- Convert TIFF to PDF
- Add dynamic text/watermark to PDF
- Bundle PDF files

**Request:** Upgrade third party library to latest supported version.

- Recommendation:**
1. Upgrade iText third party dependency
  2. Update Architecture wrapper libraries to support API version 7

**Outreach Description:** C-IV will inherit implemented version during migration.

**Migration Impact Description:** No Impact

**Alternative Procedure Description:** Continue using current iText software version.

**Operational Impact: Estimate:** **360**

Automated Test :	0	Batch/Interfaces :	30	Batch Operations :	0
CalHEERS :	20	CalHEERS Test :	0	Client Correspondence :	30
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	20	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	80	Tech Arch :	180	Tech Ops :	0
Training :	0				





# [CA-212012] Automated Regression Test (ART) - Ongoing Case Maintenance Scenarios - Phase 1

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretsky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>William Baretsky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>80</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>11/21/2019 11:02 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Anna Chia</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>06/02/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Anna Chia - 06/02/2020

**Expedite Approval:** Jo Anne Osborn - 05/01/2020

**Current Design:** The ART suite currently has limited coverage of case and household changes being applied over time.

**Request:** Expand the ART suite to include ongoing case maintenance scenarios, such as mid-period changes that will not be applied until the next reporting period.

Note: This is the first of four phases (see related SCRs).

**Recommendation:** Develop automated scripts for each of the high-level scenarios documented in the "Ongoing Case Maintenance Scenarios" attachment, with the following restrictions:

1. All dates and years will be converted to database look-ups, such that each scenario would end as of the current system date.
2. All processing, including data entry, will be performed through the online application.
3. All processing is expected to occur on a single system date. Artificial manipulation of the system date (e.g., time shift) as part of ART suite execution is outside the scope of this change.

Phase 1 summary:  
 Scenario Count: 7  
 Expected Script Count: 9

All phases:  
 Scenario Count: 93  
 Expected Script Count: 99

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **80**

Execute regression testing of these scenarios manually.

Automated Test :	80	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0

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Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



**[CA-214172] DDID 2242, 2500, 2501, 2502, 2503, 2267, 2255, 2516, 2517, 2518, 2204, 2521 - Multi, Import, Virtual Capture**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Christopher Vasquez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>449</b>
Reporter:	<b>Christopher Vasquez</b>	Regulation Reference:		Created:	<b>03/03/2020 03:46 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>06/01/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

There currently is no 58 county Imaging Solution.

**Request:**

The request is to implement the following functionality in the CalSAWS Imaging Solution:

- Create a Multi-Case capture mode
- Create a Virtual Print capture mode used to capture documents directly from any desktop application that allows printing into all capture modes
- Configure the Multi-Case, and Virtual Print capture modes to prompt users with the following options at the point of scanning: Task Override, Program Selection, No Change SAR7/QR7, and Person Override
- Ensure that the "Applicable Date" and "Received Date" fields are editable at point of capture otherwise they shall default to the capture date
- Ensure that the "Batch Number" field is editable at point of capture otherwise it shall default to the unique system generated number
- Create an Adoptions (AAP), Adult Aging Services (IHSS), Child Welfare Services (CWS), and Quality Assurance/Quality Control (QA/QC) "Other County Department" capture modes
- Configure the imaging solution to allow staff to manually index the case number, and form name for images/documents scanned into "Other County Department" capture modes
- Create a file upload capture mode, allow users to be able to drag and drop documents into the imaging solution
- Configure coversheets, system generated barcoded document, and generic separator sheets to act as separators for multi-case capture modes
- Configure hardware level barcode detection for Multi-Case capture modes

**Recommendation:**

- Configure Multi-Case capture mode in Perceptive Experience to allow for the scanning of both barcoded, and non-barcoded documents into the Imaging Solution
- Enable Virtual Printer to be used for importing non-barcoded documents into the Imaging Solution without the need to print out documents/pages first
- Configure Virtual Printer to support scanning to SIU, Hearings, RDB, and Single Case Scan modes
- Configure "Other County Department" Drawers scan modes to allow the scanning of documents into the Adoptions (AAP), Adult Aging Services (IHSS), Child Welfare Services (CWS), and Quality Assurance/Quality Control (QA/QC) drawers
- Configure File Upload scan mode to allow the direct upload of non-barcoded documents into the Imaging Solution
- Configure the system to utilize the following flags during the scan processing:
  - 1) Task Override
  - 2) Program Selection
  - 3) No Change SAR7/QR7
  - 4) Person Override
- Configure the scan modes to have the editable fields of "Applicable Date", "Received Date" and "Bundle ID" at the time of scan

- Configure multi-case scan mode to allow the use of Cover Sheets and System Generated Barcoded Documents as separators of documents
- Configure multi-case scan mode to allow the optional use of the generic separator sheets (patch code sheets) to separate documents

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**449**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	315	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	94	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



# [CA-214990] DDID 2578 FDS: Non State Forms - Add CSF 105 Form

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Gurunandan Vijendra Agnihothri</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>34</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>06/03/2020</b>		

### Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti - 6/8/2020

**Current Design:** CSF 105 – Appointment Letter does not exist in LRS/CalSAWS

**Request:** Add the CSF 105 - Appointment Letter to the LRS/CalSAWS and generate the CSF 105 from Template Repository and Customer Appointment Detail page.

**Recommendation:**

1. Add CSF 105 form to LRS/CalSAWS.
2. Add CSF 105 form to Template Repository.
3. Update Customer Appointment Detail page to generate CSF 105 form for 57 counties excluding Los Angeles county.

### Outreach

**Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **34**

N/A

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	34	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CA-214991] DDID 2578 FDS: Non State Forms - Threshold Languages - Add CSF 105

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Manisha Chatterjee</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>49</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>06/03/2020</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 6/4/2020

**Current Design:** CSF 105 - Appointment Letter doesn't exist in Threshold Languages in LRS/CalSAWS system.

**Request:** Add CSF 105 - Appointment Letter to LRS/CalSAWS system in all threshold languages.

Note: Please refer to CA-214990 for English and Spanish versions of the form.

#### Recommendation:

Add CSF 105 to LRS/CalSAWS in all Threshold Languages.

#### Outreach

##### Description:

##### Migration Impact

##### Description:

##### Migration Impact

##### Analysis:

##### Alternative

N/A

##### Procedure

##### Description:

##### Operational Impact:

**Estimate: 49**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	49	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				



**[CA-215088] DDID 2627 FDS: Non State Forms - Threshold Languages - Update CW 2213**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nilesh Deepak</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>06/05/2020</b>		

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 6/8/2020

**Current Design:** CW 2213 exists in LRS/CalSAWS in English and Spanish languages

**Request:** Update the CW 2213 in Threshold languages in the CalSAWS Software as follows:  
1) Update "County of Los Angeles" to "<County>"

**Recommendation:** Update the CW 2213 in Threshold languages to match the latest state version.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 39

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CA-215089] DDID 2627 FDS: Non State Forms - Update CW 2213

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Kamal ShakerJ</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>6</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>05/29/2020</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 6/2/2020

**Current Design:** CW 2213 form already exists in LRS/CalSAWS in 10/15 version.

**Request:** Update the CW 2213 in the CalSAWS Software as follows:  
1) Update "County of Los Angeles" to "<County>"

**Recommendation:** Update CW 2213 form to match the latest state version.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** 6

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	6	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				





# [CA-215104] DDID 2635 FDS: Non State Forms - Threshold Languages - Update CW 2201

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>P Madhan Kumar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>05/27/2020</b>		
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>	Karen Rapponotti - 6/4/2020				
<b>Current Design:</b>	CW 2201 exists in LRS/CalSAWS system in 06/09 Version				
<b>Request:</b>	Update the State form CW 2201 – Unemployment Insurance Benefits Referral Form in Threshold Languages in the CalSAWS Software as follows: 1) Update “Los Angeles County” to “<County>” 2) Update “Eligibility Worker” to “Worker” 3) Add Medi-Cal as a program				
<b>Recommendation:</b>	Update CW 2201 in all threshold languages to the match latest state version.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>					
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>39</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				

 **[CA-215105] DDID 2635 FDS: Non State Forms - Update CW 2201**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Meghana Chander</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>11</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>05/26/2020</b>		

**Non-Committee**

**Review:**  
**Expedite Approval:** Karen Rapponotti - 6/4/2020  
**Current Design:** CW 2201 form already exists in LRS/CalSAWS in 06/09 version.  
**Request:** Update the State form CW 2201 – Unemployment Insurance Benefits Referral Form in the CalSAWS Software as follows:  
 1) Update “Los Angeles County” to “<County>”  
 2) Update “Eligibility Worker” to “Worker”  
 3) Add Medi-Cal as a program

**Recommendation:** Update the State form CW 2201 – Unemployment Insurance Benefits Referral Form in the CalSAWS Software as follows:  
 1) Update “Los Angeles County” to “<County>”  
 2) Update “Eligibility Worker” to “Worker”  
 3) Add Medi-Cal as a program

**Outreach**

**Description:**  
**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure Description:**  
**Operational Impact:**  
**Estimate:** 11

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	11	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				

 **[CA-215118] DDID 2642 FDS: Non State Forms - Migrate PUB 388**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Anchita Jain</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>5</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Caroline Bui</b>	Consortium Review Approval Date:	<b>05/02/0020</b>		

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 6/2/2020

**Current Design:** The state form PUB 388 is not available in LRS/CalSAWS system.

**Request:** Migrate the State form PUB 388 – California Electronic Benefit Transfer (EBT) Card to the CalSAWS Software. The PUB 388 will be made available in the Template Repository in the CalSAWS Software for 58 Counties.

**Recommendation:** Add PUB 388 form to LRS/CalSAWS Template Repository.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative** N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 5

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	5	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				



**[CA-215119] DDID 2642 FDS: Non State Forms - Threshold Languages - Migrate PUB 388**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Thanushree Veereshappa</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>34</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Caroline Bui</b>	Consortium Review Approval Date:	<b>05/14/2020</b>		

**Non-Committee Review:**

**Expedite Approval:** Karen Rapponotti - 6/2/2020

**Current Design:** PUB 388 only exists in English and Spanish in LRS/CalSAWS system

**Request:** Migrate the State form PUB 388 – California Electronic Benefit Transfer (EBT) Card in Threshold languages to the CalSAWS Software. The PUB 388 will be made available in the Template Repository in the CalSAWS Software for 58 Counties.

**Recommendation:** Add PUB 388 to LRS/CalSAWS system in Threshold languages.

NOTE: Please refer to CA-215118 for PUB 388 English and Spanish forms information

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 34

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	34	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				

## [CA-215751] 2020 Medicare Savings Program Property Limit

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rajan Vadapalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>50</b>
Reporter:	<b>Nina Butler</b>	Regulation Reference:	<b>ACWDL 20-07</b>	Created:	<b>04/21/2020 08:08 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>06/08/2020</b>	Other Agency Cross Reference:	<b>CIV-107074</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Property limits for the Medicare Savings Program (MSP) were last updated in the LRS system for 2019.

The current MSP Property Limits are:  
Property Limit - Single: \$7,730  
Property Limit - Couple: \$ 11,600

#### Request:

Effective January 1, 2020, this letter revises the Medicare Savings Program (MSP) property limit amounts to be used in determining eligibility.

The property limits used to determine MSP eligibility increased in 2020.

The 2020 MSP Property Limits are:  
Property Limit - Single: \$7,860  
Property Limit - Couple: \$11,800

Federal law sets the MSP property limits at three times the SSI property limit plus an annual percentage increase equal to the increase in the Consumer Price Index.

New Property limits for the MSP have not been updated in the LRS system and needs to be updated to 2020 amounts.

#### Recommendation:

1. Update code\_detl.catgry\_id ="335" reference table to accommodate MSP Property limits effective 01/01/2020.
  - a) Update code\_num\_identif : "AG" Property Limit - Single value to \$7,860
  - b) Update code\_num\_identif : "AH" Property Limit - Couple value to \$11,800

2. Generate a list of cases that have a Medicare Premium Payment Program (MPPP) person who was denied or discontinued for over resources, but their property total was under the new value from 01/01/2020 through the date of implementation for this SCR.

List Name: Denied/Discontinued MPPP for over resources

The listing will consist of below columns -

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker
- Benefit Month

County Action: These cases failed MPPP property budgets from 01/2020 onwards using 2019 property limit values. The user will need to review the cases and process EDBC, if needed.

**Outreach**

CIT for list

**Description:**

**Migration Impact**

Joint design has been approved through the Medi-Cal/CMSA Committee. C-IV will implement this change with SCR CIV-107074 in the 20.09 release.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

Override EDBC.

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**50**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	30	CalHEERS Test :	15	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



# [CA-215774] Update Last Month of Reversal for SSI Cash Out Population

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Mark Keehn</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Mark Keehn</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>162</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>Exec Order, ACL 18-90</b>	Created:	<b>04/21/2020 05:47 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Tyler Vaisau</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-107088</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approval provided by Karen and Laura as this part of COVID-19 emergency

**Current Design:** Last month of SSI Cash out reversal is expected to be 10/2020.

**Request:** Given that Recertifications and SAR7s are not being actioned for March, April, and May of 2020, EDBC will not be reversing CF programs with SSI/SSP persons during those months. This means the auto creation of SNB and TNB programs will also be suppressed. EDBC will reverse these cases at the next SAR or RE. However, some of these reversals will occur after 10/2020, which was previously expected to be the last month for which it was possible to have a reversal.

#### Recommendation:

- Update the following sections of the system to use the new 'last possible reversal month' of 10/2021.
- 1. LRS/CalSAWS Only: Update the CF yellow banner logic to account for the last possible reversal month. The yellow banner is used to alert the user when a CalFresh program is eligible for an SSI/SSP reversal determination.
- 2. Update the validation message and logic which is triggered on the CalFresh SSI/SSP Reversal Detail page to account for the last possible reversal month.
- 3. Update Code Table 73 to extend the time period for which the 'Gets SSI/SSP' (CT73 - 25) Status Reason is available to account for the last possible reversal month.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**162**

The user would use an earlier (but incorrect) SSI/SSP Reversal Month to avoid the validation message on the SSI/SSP Reversal Detail page.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	20	Eligibility :	14
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	67	Performance :	0	Release Communication Support :	7
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	32	Tech Arch :	0	Tech Ops :	0

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Training :

0





# [CA-216150] Automated Regression Test (ART) - Ongoing Case Maintenance Scenarios - Phase 2

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretsky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>William Baretsky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>220</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>05/05/2020 03:20 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Anna Chia</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>06/02/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Anna Chia - 06/02/2020

**Expedite Approval:** Jo Anne Osborn - 05/01/2020

**Current Design:** The ART suite currently has limited coverage of case and household changes being applied over time.

**Request:** Expand the ART suite to include ongoing case maintenance scenarios, such as mid-period changes that will not be applied until the next reporting period.

Note: This is the second of four phases (see related SCRs).

**Recommendation:** Develop automated scripts for each of the high-level scenarios documented in the "Ongoing Case Maintenance Scenarios" attachment, with the following restrictions:

1. All dates and years will be converted to database look-ups, such that each scenario would end as of the current system date.
2. All processing, including data entry, will be performed through the online application.
3. All processing is expected to occur on a single system date. Artificial manipulation of the system date (e.g., time shift) as part of ART suite execution is outside the scope of this change.

Phase 2 summary:  
 Scenario Count: 21  
 Expected Script Count: 25

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 220

Execute regression testing of these scenarios manually.

Automated Test :	220	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0

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System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CA-216151] Automated Regression Test (ART) - Ongoing Case Maintenance Scenarios - Phase 3

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretsky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>William Baretsky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.10.XX</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>310</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>05/05/2020 03:23 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Anna Chia</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>06/02/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Anna Chia - 06/02/2020

**Expedite Approval:** Jo Anne Osborn - 05/01/2020

**Current Design:** The ART suite currently has limited coverage of case and household changes being applied over time.

**Request:** Expand the ART suite to include ongoing case maintenance scenarios, such as mid-period changes that will not be applied until the next reporting period.

Note: This is the third of four phases (see related SCRs).

**Recommendation:** Develop automated scripts for each of the high-level scenarios documented in the "Ongoing Case Maintenance Scenarios" attachment, with the following restrictions:

1. All dates and years will be converted to database look-ups, such that each scenario would end as of the current system date.
2. All processing, including data entry, will be performed through the online application.
3. All processing is expected to occur on a single system date. Artificial manipulation of the system date (e.g., time shift) as part of ART suite execution is outside the scope of this change.

Phase 3 summary:  
 Scenario Count: 30  
 Expected Script Count: 30

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 310

Execute regression testing of these scenarios manually.

Automated Test :	310	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0

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System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				



## [CA-200321] Display the Collect button on the Issuance Detail page for all Service Payments

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Jimmy Tu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>86</b>
Reporter:	<b>Jimmy Tu</b>	Regulation Reference:		Created:	<b>01/25/2018 07:22 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Collections]</b>	Approved by Committee:	<b>06/05/2020</b>	Other Agency Cross Reference:	<b>Tracker-951</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval: Current Design:**

For Direct Deposit and Warrant Service Payment issuances, the LRS/CalSAWS displays a "Collect" button on the Issuance Detail page. This functionality allows users to create a Recovery Account Overpayment tied to that Issuance.

"Collect" Button does not display on Issuance Detail page for EBT issuances and Supplemental Benefit Warrant Issuances created through a Service Arrangement. Therefore, this SCR should be evaluated and prioritized for migration impacts.

**Request:**

This is a request to close the gap in between C-IV (951) and LRS/CalSAWS. C-IV already has this functionality and LRS/CalSAWS is also being evaluated to consider when the "Collect" button should be shown.

**Recommendation:**

Update the Issuance Detail page to display the "Collect" button for all issuances associated to supportive service payments (where payment\_req\_id exists)

Update the Issuance Detail Online Help page.

**Outreach Description:**

**Migration Impact Description:**

C-IV implemented this change with Tracker 951. This SCR will align LRS/CalSAWS with C-IV and resolve the design difference.

**Migration Impact Analysis:**

**Alternative Procedure Description:**

N/a

**Operational Impact:**

**Estimate: 86**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	66	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	20	Tech Arch :	0	Tech Ops :	0
Training :	0				



## [CA-203748] Move accounts from GR Assistance Unit to GRAH Budget Unit

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Jimmy Tu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Jimmy Tu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>45</b>
Reporter:	<b>Myra Aldana</b>	Regulation Reference:		Created:	<b>07/26/2018 02:59 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Gloria Williams</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Committee:	<b>[Fiscal]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee Review:** Jennifer Casillas (Los Angeles) - Approved by Region 6 - 05/27/2020

**Expedite Approval:**  
**Current Design:** The accounting string information for General Relief "B1 Subsidies Move in Cost" are currently mapped to Unit 26460.

**Request:** The Los Angeles County has requested to update the accounting string information for fund code, "B1 Subsidies Move in Cost" from the GR Assistance Unit 26460 to the GRAH Budget Unit 26461.

**Recommendation:** Update the accounting string information for "B1 Subsidies Move in Cost" Fund Code from the GR Assistance Unit 26460 to the General Relief Anti-Homelessness (GRAH) Budget Unit 26461.

### Outreach

#### Description:

**Migration Impact Description:** This functionality applies only to L.A. County and does not impact the other counties.

#### Migration Impact

#### Analysis:

#### Alternative

N/a

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **45**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	28	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	12	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



# [CA-214052] DDID 2514 - Handling Other County's Documents

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>502</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>06/01/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

**Review:**

**Expedite Approval:**

**Current Design:** Currently, there is no design for the Imaging Solution.

**Request:** Per DDID 2514, configure the imaging solution to allow documents received/captured in a county to be sent to the county that generated or requested the document.

**Recommendation:** Create workflow queue to route documents that were generated or requested by a different county.  
Configure the system to route documents to the original county that requested/generated the document.

### Outreach

**Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **502**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	351	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	105	Tech Arch :	0	Tech Ops :	0
Training :	0				

 **[CA-214047] DDID 2510 - Append Similar Images Together**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>13</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>06/01/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** Currently, there is no design for the Imaging Solution.  
**Request:** Per DDID 2510, configure the imaging solution repository#to append all documents where the indexing values are the same.  
**Recommendation:** Configure the imaging solution repository#to append all documents where the indexing values are the same.

**Outreach**

**Description:**  
**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure Description:**  
**Operational Impact:**  
**Estimate:** **13**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	9	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	3	Tech Arch :	0	Tech Ops :	0
Training :	0				





## [CA-214048] DDID 2199, 2502, 2255, 2503 - Categorize by OCR

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>3364</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>06/05/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently, there is no design for the Imaging Solution.

#### Request:

Per DDID 2199, configure the core capture and indexing scan modes (Single Case, Virtual Print, and Multi-case) to do the following:

- 1) Automatically categorize all system generated documents.
- 2) Automatically categorize up to 70 person level/verification documents.
- 3) Read the form number from a specified location on the document(s) to be determined during detailed design.
- 4) Capture the Form Name, Form Number, Case Name, Case Number, and Document Type as key metadata.
- 4a) Documents with no case number are automatically sent to a quality assurance queue for review.
- 5) Compare the confidence score of all automatically categorized documents to a confidence threshold.
- 5a) All scanned documents that do not meet the categorization confidence threshold are sent to a quality assurance queue for review. All cases associated the document that does not meet the confidence thresholds will be sent to a quality assurance queue for review.
- 6) Designated staff to be prompted to select case member, multiple persons, or no person option for all person level document types which will be determined during detailed design.

Per DDID 2502, ensure that the following scan modes attempt to locate a CalSAWS Software system generated barcode:

- 1) Capture and Indexing Single Case
- 2) Capture and Indexing Multi-Case
- 3) Capture and Indexing Virtual Print
- 4) Returned Mail

The CONTRACTOR shall read the CalSAWS Software system generated imaging/tracking barcodes.

Single Case scan mode is described in CA-214030 (Single Case and Barcode Detection). Multi-Case and Virtual Print scan modes are described in CA-214172 (Multi, Import, Virtual Capture). Return Mail Scan Mode is described in CA-214061 (Returned Mail Capture Mode)

Per DDID 2255, configure the imaging solution to read a unique 2D barcode from all CalSAWS Software system generated forms. This barcode will contain the barcode number which is used to identify the document(s) metadata from the CalSAWS Software.

Barcode scanning is described in CA-214030 (Single Case and Barcode Detection)

Per DDID 2503, configure the imaging solution to allow the following documents to act as separators for the capture and indexing multi-case scan mode and returned mail multi-case scan mode:

- 1) Cover Sheets - Will contain a barcode with a case number or a no case identifier
- 2) System Generated Barcoded Documents

The CONTRACTOR shall configure the imaging solution to allow the optional use of generic separator sheets for all scan modes to assist in separating documents.

The CONTRACTOR shall configure the imaging solution to allow the optional use of envelopes as separator sheets for the returned mail multi-case scan mode.

Advanced optical character recognition will be leveraged to identify envelopes when used in the returned mail scan modes. The use of other separation options are documented in CA-214172 (Multi, Import, Virtual Capture)

**Recommendation:**

- Configure the Imaging Solution to read a barcode or text equivalent from CalSAWS generated documents
- Configure the Imaging Solution to perform a webservice call to CalSAWS to validate the extracted barcode value and retrieve case information
- Configure the Imaging Solution to read a form number from County generated documents
- Configure the Imaging Solution to determine a form name for person/verification documents that meet a confidence threshold
- Configure the Imaging Solution to set an exception reason when person/verification documents do not meet a confidence threshold
- Configure the Imaging Solution to recognize a No Case barcode coversheet
- Configure the Imaging Solution to send documents generated by the Virtual Print Driver through OCR to capture any barcode or form number information
- Configure OCR to recognize envelopes captured using the returned mail scan mode as identifiers for intended separation

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**3364**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	2274	IVR/CC :	0
Online :	92	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	682	Tech Arch :	21	Tech Ops :	0
Training :	0				

End SCRs



# [CA-212924] Modify DPSS Renewals Performance Measures Dashboard

- Resolved: 06/01/2020 01:44 PM

Team Responsible:	<b>Reports</b>	Assignee:	<b>Sumanta Mukhopadhyay</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Jeric Derama</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.06.05</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>453</b>
Reporter:	<b>Lien Phan</b>	Regulation Reference:		Created:	<b>01/15/2020 06:32 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Lien Phan</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee Review:

Approved by Laura on 3/17/2020

## Expedite Approval:

Expedited Start Build Approval provide by Karen J. Rapponotti <RapponottiKJ@CalSAWS.org> on 3/18/2020

## Current Design:

The current Performance Measures Dashboard has two tiers, the Department Level and the Division/Office level. Each tier has a Renewals section that can be drilled down for a given program to showcase statistics on overall renewal progress.

The Renewals section is broken down to the following programs:

- CalWORKs Redeterminations
- CalFresh NA/PA Recertifications
- Medi-Cal Renewals
- CAPI Redeterminations

Each program when drilled down to, displays a table containing a 3 month break down with the following lines:

1. Total Due
2. Received
3. Processed
4. % Processed
5. Terminations
6. Continue Eligibility
7. Rescissions (Not a subset of due)

## Request:

The changes below will affect both the Department level and Division/Office level tiers of the Performance Measures Dashboard.

- The drill down table in the renewals section will have two new additional lines:
- Batch Terminations
- Delinquent
- The Terminations line will now be updated to Manual Terminations.
- The Continue Eligibility line will now be updated to Continued Eligibility.
- Line order and indentations will be changed within the drill down table.
- The existing note under the drill down table will be removed:

\*A logic revision was made as part of Nov2018 release to make renewals received and processed a subset of renewals due in the report month.

## Recommendation:

The Renewals section in the Performance Measures Dashboard contains four programs:

- CalWORKs
- CalFresh NA/PA
- Medi-Cal
- CAPI

Each program displays a table in their respective drill down page. This table is formatted the same throughout each program and is data-specific to each program.

Two new lines Batch Terminations and Delinquent will be added to the table found in the renewals section drill down.

The existing Terminations and Continue Eligibility lines in Renewals section drill down table will now be Manual Terminations and Continued Eligibility respectively.  
The table will now follow the new format below:

1. Total Due
2. Received
3. Processed
  - a. Continued Eligibility
  - b. Manual Terminations
4. % Processed
5. Batch Terminations
6. Delinquent
7. Rescissions (Not a subset of due)

Please note: The Renewals section drill down page for Medi-Cal has another table which contains the following lines:

1. Auto Authorized
2. MAGI Only Cases
3. % Auto Authorized

This second table will not be updated as part of this SCR and will instead be updated as part of SCR CA-202177.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

C-IV feedback has been addressed and the design has been approved through the Management Reports Committee. The C-IV counties will be adopting this functionality as part of migration.

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

453

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	7	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	316	Reports Test :	130	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before: Figure 2.1 shows Manual Terminations Before Continued Eligibility

After: Figure 2.1 is corrected and shows Continued Eligibility before Manual Terminations

Before: Section 2.3 on Line Definitions for Processed - Out of Total Due, Number of Continued Eligibility and Number of Manual Terminations for a given program for the prompted month.

Processed = Continued Eligibility + Manual Terminations

After: Section 2.3 on Line Definitions for Processed - Out of Total Received, Number of Continued Eligibility and Number of Manual Terminations for a given program for the prompted month.

Processed = Continued Eligibility + Manual Terminations

2. Estimate Change: N/A

- 3. Release Change: N/A
- 4. Funding Source Change: N/A

**Content Revision  
Status-2:  
Content Revision  
Description-2:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:  
Content Revision  
Description-3:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:  
Content Revision  
Description-4:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:



# [CA-216190] Continue Posting List of DCFS Medi-Cal Discontinuances from Batch EDBC

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.06.24</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>15</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:	<b>MEDIL I 20-14</b>	Created:	<b>05/06/2020 06:11 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Karen Rapponotti on 3/16/2020

**Expedite Approval:**

**Current Design:** CA-215220 was designed to post a monthly list for DCFS Medi-Cal Discontinuances from Batch EDBC until the end of the planned delay of discontinuances due to the Executive Order for COVID-19.

The April and May lists were posted on 4/24/2020.  
The June list will be posted on 5/25/2020.

**Request:** DHCS is extending the delay of discontinuances from 05/31/2020 until 08/31/2020 so the lists need to be generated and posted for three additional months.

**Recommendation:** Continue to generate the list from CA-215220 for three additional months.

Frequency: Run once per month for discontinuances effective July and August.

The lists will be posted to the following location:  
CalSAWS CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-215220

The July list will be posted on 6/24/2020.  
The August list will be posted on 7/24/2020.  
The September list will be posted on 8/24/2020.

**Outreach Description:** CIT w/posted list.

**Migration Impact Description:** No Impact

**Alternative Procedure:** None

**Operational Impact:**

**Estimate:** 15

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	15	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				

**Content Revision  
Status-1:  
Content Revision  
Description-1:**

Pending CCB

1. Recommendation Change: MEDIL I20-14 informed that the EO will be extended until further notice. The List will be posted through the end of the Calendar year.

Before:

Request:

DHCS is extending the delay of discontinuances from 05/31/2020 until 08/31/2020 so the lists need to be generated and posted for three additional months.

Recommendation:

Continue to generate the list from CA-215220 for three additional months.

Frequency: Run once per month for discontinuances effective July and August.

The lists will be posted to the following location:

CalSAWS CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-215220

The July list will be posted on 6/24/2020.

The August list will be posted on 7/24/2020.

The September list will be posted on 8/24/2020.

After:

Request: MEDIL I20-14 informed that the EO will be extended until further notice. The List will be posted through the end of the Calendar year. Add column for DOB and prior aid code.

Recommendation:

Continue to generate the list from CA-215220 until the end of the calendar year. Add a column to the list for DOB and prior aid code.

Frequency: Run once per month on the 24th of the month starting on 6/24/2020 for July Discontinuances. If the 24th falls on a holiday or weekend, run the following business day. Run the list until 12/24/2020, for January Discontinuances.

The lists will be posted to the following location:

CalSAWS CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-215220

2. Estimate Change:

Before: CalHEERS ETC: 15

After: CalHEERS ETC: 30

**Content Revision  
Status-2:  
Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**





# [CA-58123] Prevent Advancing Medi-Cal Renewal with a Soft Pause Individual

- Resolved: 04/17/2020 09:08 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Lucas Galleguillos</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:	<b>Rajan Vadapalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1085</b>
Reporter:	<b>Ted Anderson</b>	Regulation Reference:	<b>ACWDL 17-35</b>	Created:	<b>01/19/2018 11:42 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>2020-05-11</b>	Other Agency Cross	<b>CIV-10791</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Committee:	<b>00:00:00.0</b>	Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Approved by JoAnne Osborn - 02/24/2020

### Current Design:

When a MAGI Medi-Cal individual reports a change or is reevaluated during the annual renewal period, CalHEERS protects the individual from adverse actions to their MAGI Medi-Cal eligibility by placing the individual in Soft Pause. The annual renewal period begins two months prior to the RE Due Date until the program is renewed.

Soft Pause protects the individual until the County Eligibility Worker (CEW) evaluates the individual for MAGI Medi-Cal with a premium or for other Medi-Cal programs not subject to MAGI, such as Non-MAGI Medi-Cal or Consumer Protection Programs (CPPs).

CalHEERS Soft Pause protections will continue until Soft Pause is lifted by a CEW through an Eligibility Determination Request (EDR). Once Soft Pause is lifted, adverse actions can be applied per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual can be moved to another aid code or discontinued from MAGI Medi-Cal.

With CalHEERS Release 16.4, C-IV SCR 2713 and LRS SCR 36160 updated The Systems with functionality to allow a CEW to send a 'Soft Pause Lift' indicator to CalHEERS in an EDR. When CalHEERS receives the 'Soft Pause Lift' indicator, CalHEERS lifts Soft Pause and applies adverse actions per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual is moved to another aid code or discontinued from MAGI Medi-Cal. CalHEERS sends a MAGI Determination of Eligibility Response (DER) to The Systems with the individual's new MAGI Medi-Cal eligibility/discontinuance and the Eligibility Evaluation Reason code 'Soft Pause Lift'. The CEW can then move the individual to the new MAGI Medi-Cal aid code or evaluate the individual for Non-MAGI Medi-Cal.

C-IV Medi-Cal EDBC Batch skip logic will skip a case with skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause. C-IV generates through batch a Non-MAGI Screening Packet for any individual with Eligibility Evaluation Reason of 'Soft Paused' on the DER received during the Batch MAGI Renewal process. This allows the C-IV CEW to manually request the 'Soft Pause Lift' to determine the individual's correct benefits when the Non-MAGI Screening Packet is returned. CalSAWS does not have the Medi-Cal Batch EDBC Skip logic nor the batch to generate the Non-MAGI Screening Packet. CalSAWS CA-203981 added the Non-MAGI Screening Packet to the template repository in Release 19.11.

The Systems allow CEWs to run Medi-Cal EDBC against a MAGI Determination that contains an individual in Soft Pause and establish a new annual renewal period. When an individual is in Soft Pause, the MAGI Determination provides the updated income and household size information with incorrect Federal Poverty Level (FPL) limit. As a result, during MAGI Renewals, The Systems generates a MAGI Renewal Notice of Action (NOA) with the incorrect FPL amounts. This can be misleading to the individual.

C-IV allows the CEW to select the 'RE' EDBC Run Reason during the annual renewal period and outside the annual renewal period to establish a new renewal period when processing a reported change. In C-IV 'RE' EDBC Run Reason is displayed when EDBC benefit month is on or after the Re-Evaluation begin month.

CalSAWS allows a worker to select a Run Reason from the EDBC Run Reason dropdown only when running Medi-Cal EDBC for a single-month. In CalSAWS 'RE' EDBC Run Reason is displayed only if the benefit month is after the RE Due Date or if a 'RE' packet exists for the 'RE' Due month.

C-IV sends 'Renewal – manual renewal' (RM) EDR Run Reason to CalHEERS during the annual renewal period starting with the EDR Benefit Month two months prior to the RE Due Date and beyond.

For example: A Medi-Cal program has RE Due Date 06/30/2020.

Beginning with EDR benefit month 05/2020 and beyond, C-IV sends 'RM' EDR Run Reason until a new annual renewal period is established.

CalSAWS does not send 'RM' EDR Run Reason.

CalSAWS automatically sets the EDBC Run Reason to 'RE' if the EDBC Run Reason is left blank when all the following are true:

- The EDBC benefit month is equal to the month following the RE Due Date or the EDBC benefit month is equal to the come-up month.
- The appropriate RE packet was generated for the RE Due Month for the program.
- The latest RE packet status is either 'Not Applicable' or 'Reviewed-Ready To Run EDBC'

C-IV does not have functionality to automatically set the EDBC Run Reason to 'RE', but C-IV does have a page validation on the Run EDBC and Negative Action Detail pages that require the worker to run EDBC with 'RE' Run Reason when all the following are true:

- The latest MAGI determination for the benefit month has a 'RE' or 'RM' Run Reason.
- The benefit month is no earlier than one month prior to 'RE' due month.
- 'RE' Run Reason was not selected while running EDBC.
- Not an Auto Test scenario.

The MAGI Emulator allows testing of changes to The Systems that rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment. The MAGI Emulator does not have functionality to return Soft Pause or Soft Pause Lift in the MAGI Determination. See the current functionality of MAGI Emulator in Supporting Documents.

**Request:**

Per ACDWL 17-35, Medi-Cal individuals must be evaluated for Non-MAGI Medi-Cal if the individual was found MAGI Medi-Cal eligible with Soft Pause during the renewal process before advancing the renewal due date.

1. Require the CEW to lift Soft Pause prior to running Medi-Cal EDBC with 'RE' EDBC Run Reason.
2. Add a new EDBC Run Reason, 'Soft Pause/Non-RE', that will allow a CEW to run Medi-Cal EDBC during the annual renewal period with an individual in Soft Pause that will not advance the renewal due date. This 'Soft Pause/Non-RE' EDBC Run Reason should only be used for exceptions when the CEW is unable to lift Soft Pause due to 10-day noticing or CalHEERS issues. For example: a 'Person Add' during renewal or to process a Negative Action for a non-Soft Pause individual while waiting for the Non-MAGI Screening Packet for the Soft Pause individual.
3. Update CalSAWS Batch EDBC Skip logic to skip a case with a new skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause.
4. Update The Systems to generate a Non-MAGI Screening Packet when an individual is skipped through batch for Soft Pause and the MAGI Determination Run Reason code is 'Renewal - batch administrative renewal' (RE).
5. Update CalSAWS to create a Journal entry when the Non-MAGI Screening Packet is generated through batch.
6. Update CalSAWS to allow the CEW to select 'RE' EDBC Run Reason to establish a new renewal period during reported changes outside the annual renewal period.
7. Update CalSAWS to send 'RM' EDR Run Reason during the annual renewal period.
8. Update The Systems to automatically set the EDBC Run Reason to either 'RE' or 'Soft Pause/Non-RE' when appropriate during the annual renewal period.
9. Update the MAGI Emulator to have Soft Pause and Soft Pause Lift functionality to allow the testing of changes in The Systems which rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment.

**Recommendation:**

1. Update the Run EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program to prevent a CEW from advancing the renewal when an individual is Soft Paused.
2. Update the Negative Action Detail page to display 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program to prevent a CEW from advancing the renewal when an individual is Soft Paused.
3. Update Create Manual EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason.
4. Update the Medi-Cal EDBC Summary page to display a notification message when 'Soft Pause/Non-RE' Run Reason is auto-set during the Medi-Cal EDBC evaluation.

5. Add 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program. Update The Systems to auto-set the EDBC Run Reason to either 'Soft Pause/Non-RE' or 'RE' when appropriate.
6. Update eHIT Disposition functionality for the new EDBC Run Reason 'Soft Pause/Non-RE'. CalSAWS only: Update eHIT logic to have 'RM' EDR Run Reason functionality.
7. CalSAWS only: Add a Batch EDBC Skip Reason 'Soft Paused' that will skip a case from Batch EDBC processing when the valid DER has at least one individual with Eligibility Evaluation Reason of Soft Pause.
8. CalSAWS only: Update the Batch MAGI Renewal Sweep to exclude cases from processing through Batch MAGI if the worker has already initiated the MAGI Renewal manually (RM) from the online page.
9. Create a new batch job for CalSAWS and update the existing batch job for C-IV to only generate the Non-MAGI Screening packet through batch for cases which are skipped during Batch EDBC with the reason of Soft Pause. CalSAWS only: Add a journal entry when the Non-MAGI Screening packet is generated through batch.
10. Update the MAGI Emulator to return MAGI Determinations with Soft Pause and Soft Pause Lift. The MAGI Emulator is used for testing purposes only to emulate the results returned from CalHEERS on a MAGI Determination.
11. Regression test the DHCS Renewals Master Request reports for the updated manual renewal EDR run reason functionality.

See CA-58123\_CIV-10791\_SoftPause during RE.docx for detailed design.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

C-IV will implement this Change with SCR CIV-10791 in the 20.02 release.

N/A

**1085**

Automated Test :	25	Batch/Interfaces :	50	Batch Operations :	0
CalHEERS :	405	CalHEERS Test :	299	Client Correspondence :	185
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	20	Reports Test :	6	Support :	0
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

1. Recommendation Change:

**Description-1:**

A. Updated 'Soft Pause/Non-RE' EDBC Run Reason to display at all times in the EDBC Run Reason dropdown for Medi-Cal Program.

Before:

2.1.3.2. and 2.2.3.2. Display 'Soft Pause/Non-RE' in the EDBC Run Reason drop down for the Medi-Cal program when the valid MAGI Determination for the benefit month has at least one individual on the program with Eligibility Evaluation Reason of Soft Pause.

After:

2.1.3.2. and 2.2.3.2. Display 'Soft Pause/Non-RE' in the EDBC Run Reason drop down for the Medi-Cal program.

B. Update auto-set of EDBC Run Reason to 'RE' for Non-MAGI Turning 65 Packet

The Non-MAGI Turning 65 Packet was included in the recommendations with the rest of the Medi-Cal Renewal packets; however, since the Non-MAGI Turning 65 Packet should only be considered for auto-setting of 'RE' when there is no other Medi-Cal Renewal Packet for the MC program for the same time frame, the Non-MAGI Turning 65 Packet was removed from those sections and now has its own section.

Also, auto-set of 'RE' for Non-MAGI Turning 65 Packet functionality was added to LRS/CalSAWS with CA-203981 in Release 19.11. The Current Design was updated to state this and Recommendations 2.5.2.2.B.b and 2.5.2.2.D.b describe the changes needed for LRS/CalSAWS specifically

Before:

2.5.2.2.A and 2.5.2.2.B included Non-MAGI Turning 65 Packet.

After:

2.5.2.2.A does not include Non-MAGI Turning 65 Packet.

2.5.2.2.B is a new section specific to only Non-MAGI Turning 65 Packet.

2.5.2.2.C was previously 2.5.2.2.B and does not include Non-MAGI Turning 65 Packet.

2.5.2.2.D is a new section specific to only Non-MAGI Turning 65 Packet.

2.5.2.2.E was previously 2.5.2.2.C. No change to recommendation other than number.

2. ETC Change:

Before:

CalHEERS ETC: 350

CalHEERS Test ETC: 259

Unallocated Hours: 85

After:

CalHEERS ETC: 405

CalHEERS Test ETC: 299

Unallocated Hours: 95

3. Release Change:

N/A

Pending CCB

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

A. Update to design to remove from criteria of auto-setting the EDBC Run Reason to 'RE' when a RE Packet status is "Not Applicable"

Before:

Current Design:

CalSAWS automatically sets the EDBC Run Reason to 'RE' if the EDBC Run Reason is left blank when all the following are true:

- The EDBC benefit month is equal to the month following the RE Due Date or the EDBC benefit month is equal to the come-up month.
- The appropriate RE packet was generated for the RE Due Month for the program.
- The latest RE packet status is either 'Not Applicable' or 'Reviewed-Ready To Run EDBC'

Sections 2.5.2.2.A.e.i, 2.5.2.2.C.f.i, 2.5.2.2.E.e.i include 'Not Applicable' status in the auto-set criteria

After:

Current Design:

CalSAWS automatically sets the EDBC Run Reason to 'RE' if the EDBC Run Reason is left blank when all the following are true:

- The EDBC benefit month is equal to the month following the RE Due Date or the EDBC benefit month is equal to the come-up month.
- The appropriate RE packet was generated for the RE Due Month for the program.
- The latest RE packet status is 'Reviewed-Ready To Run EDBC'
- The Non-MAGI Turning 65 Packet submit month equals the Medi-Cal EDBC benefit month and the latest Non-MAGI Turning 65 Packet status is 'Reviewed - Ready to Run EDBC' if there does not exist any Medi-Cal RE packet for the RE due month for the program in Release 19.11 with CA-203981.

Sections 2.5.2.2.A.e.i, 2.5.2.2.C.f.i, 2.5.2.2.E.e.i do not include 'Not Applicable' status in the auto-set criteria

B. In section 1.4, added assumption 4 to document a DHCS decision regarding The Systems sending Non-MAGI Screening Packets for a specific population CalHEERS determined in Soft Pause.

C. In section 2.7.2, added note to inform that Batch EDBC skips display on the Batch Eligibility Report.

D. In Section 2.9.2, added note to clarify packet generation when there are multiple packets and or multiple eligibility statuses on the MAGI Determination.

E. In Section 2.1.3 Added a condition how we display the 'RE' Run Reason on Run EDBC page : "Do not display 'RE' Run Reason in the drop down if the valid DER to be used by EDBC for this Medi-Cal program contains at least one Soft Pause individual".

See Content Revision 2 design document attached to JIRA for details.

2. ETC Change:

Before:

CalHEERS: 405

CalHEERS Test: 299

Unallocated Hours: 95

After:

CalHEERS ETC: 425

CalHEERS Test ETC: 320

Unallocated Hours: 105

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



# [CA-213788] Provide Adobe Captivate Support to Consortium Training Team

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.07.17</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>50</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>02/21/2020 01:31 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ashley Arnold</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ashley Arnold- 2/24/20

**Expedite Approval: Current Design:** Currently, there is no SCR for supporting the Consortium Training team on Adobe Captivate.

**Request:** Provide Adobe Captivate support to the Consortium Training team as they begin working on CalSAWS WBTs.

**Recommendation:** Provide Adobe Captivate support to the Consortium Training team as they begin working on CalSAWS WBTs, including assistance with system captures and troubleshooting Captivate issues.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

None.

**50**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	50				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change: N/A

2. ETC Change: N/A

3. Release Change:  
Before: 20.06, Minor Version 20.07.17  
After: 20.09, Minor Version 20.11.20

4. Funding Source Change: N/A



# [CA-214818] Training: Update Security Administration WBTs for 20.03 App Dev Changes

- Resolved: 06/03/2020 12:58 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Luis Alvarado</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.07.17</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>30</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>03/31/2020 10:18 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:**

Approved by Ana Cruz on April 1, 2020

**Expedite Approval:**

**Current Design:**

Security Administration WBTs are impacted by system changes implemented with the 20.03 Production release.

**Request:**

Security Administration WBTs need to be updated to reflect system changes implemented with the 20.03 Production release.

**Recommendation:**

Update the following Security Administration WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 140-SAS-Security Administration-01-A
  - a. CA-207458 (updates to Staff Detail and Security Assignment pages)
  - b. CA-207410 (removes the Auto Assign indicator field on the Office Detail page)
2. 140-SAS-Security Administration-01-B
  - a. CA-207458 (updates to Staff Detail and Security Assignment pages)
3. 140-SAS-Security Administration-02
  - a. CA-207458 (updates to Staff Detail and Security Assignment pages)
4. 140-SAS-Security Administration-03
  - a. Address unresolved comments from 20.03.20 review cycle

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**30**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	30				

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision  
Description-1:**

1. Recommendation Change: N/A
2. Estimate Change:  
Before: 30  
After: 55
3. Release Change: N/A
4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:
4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:
4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:
4. Funding Source Change:  
Before:  
After:



# [CA-200879] ACL 19-95 Automate Disaster CalFresh

- Resolved: 05/25/2020 09:11 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Srinivas Sajja</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>11614</b>
Reporter:	<b>Sridhar Mullapudi</b>	Regulation Reference:	<b>MPP 63-900</b>	Created:	<b>02/15/2018 10:12 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>DCF</b>
Committee:	<b>[CalWORKs/CalFresh]</b>	Approved by Committee:	<b>2020-04-02 00:00:00.0</b>	Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 4/2/2020

### Current Design:

When a natural disaster occurs, the County can submit a request to the State to enable Disaster CalFresh benefits for the residents of the affected areas. If a participant was not receiving CalFresh benefits, they can apply for Disaster CalFresh program to receive disaster benefits. If the participant was already receiving CalFresh benefits, they may receive supplemental or replacement CalFresh benefits.

LRS/CalSAWS application pages capture disaster information when a disaster has been activated. Disaster CalFresh indicator on the CalFresh program application is used to distinguish Disaster CalFresh Applications (CF-385) from a regular CalFresh Application (CF 285) in LRS/CalSAWS Systems. Manual EDBC is created with a disaster specific manual EDBC reason and issuances are rushed to issue supplemental or disaster CalFresh benefits.

During a disaster, the California Department of Social Services (CDSS) mandates that counties affected by a disaster submit a Disaster CalFresh Daily report containing various information about disaster applications and aid distributed. This report is automated in LRS/CalSAWS Systems.

### Request:

1. Add Disaster CalFresh into CalSAWS system and fully automate the eligibility determination and benefit issuance.
2. Update CF 385(APPLICATION FORDISASTER CALFRESH), CF 303(REPLACEMENT OR DISASTER SUPPLEMENT AFFIDAVIT) and add CF 390(NOTICE OF APPROVAL/DENIAL FOR DISASTER CALFRESH) to the Template Repository.
3. Generate Approval or Denial NOA when the DCF program is approved or denied respectively.
4. Modify IEVS Inbound jobs to not load abstract that is associated to Disaster CalFresh.
5. Update image scanning (Kofax) web services to be able to send/receive DCF program between LRS/CalSAWS and Electronic Document Management System (EDMS).

### Recommendation:

1. Update pages to allow the tracking of the new Disaster CalFresh program. This will include:
  - a. Case Summary – Disaster CalFresh Program Detail
  - b. Disaster CalFresh Detail
  - c. Select Programs
  - d. New Program Detail
  - e. New/Reapplication Detail
  - f. Application Detail
  - g. Rescind Detail
  - h. Disaster CalFresh Person Detail
  - i. Disaster CalFresh Person History
  - j. Disaster CalFresh History
  - k. Position Detail
  - l. Administrative Role Detail
  - m. Workload Reassignment Detail
  - n. Pending Assignment List
  - o. Household Income Resources Expenses List
  - p. Household Income Resources Expenses Detail
  - q. Other Program Assistance Detail
  - r. Eligibility Workload Inventory

2. Update the run EDBC and manual EDBC pages to include Disaster CalFresh program
3. Add new Disaster CalFresh EDBC summary page for online and manual EDBC to display disaster CalFresh EDBC results. The user will be able to override the EDBC
4. Add new Disaster CalFresh EDBC rules to determine the household's eligibility and benefits for Disaster CalFresh program. The financial eligibility is determined by one of two options which will be declared by the state at the time of disaster. This option will be inserted into the system when inserting the disaster information through a DCR. This option will be used by all Disaster CalFresh EDBCs for that disaster.
5. Add new run reason for CalFresh EDBC that will be used as an indicator to determine the CalFresh household's eligibility to supplemental disaster CalFresh benefits
6. Update CalFresh EDBC logic to determine the household's eligibility and benefits for supplemental disaster CalFresh program
7. The supplemental disaster CalFresh EDBC is not used in determining the regular CalFresh/TCF benefits.
8. CalFresh/TCF EDBC shall not provide additional supplements or create an overissuance if the household received maximum allotment of the household size due to a disaster supplement.
9. Updated Disaster CalFresh Daily Report to reflect the logical changes made for the automation of the Disaster CalFresh program
10. Rename the CalFresh Disaster Services Daily Report to CalFresh Disaster Issuance Daily Report and update its logic to reflect the logical changes made for the automation of the Disaster CalFresh program.
11. Update fiscal cash reports to appropriately include Disaster CalFresh issuance information.
12. Modify IEVS Inbound jobs to not load an Abstract that is associated to Disaster CalFresh.
13. Update Kofax web services to be able to send/receive DCF program between LRS/CalSAWS and EDMS.
14. Update CF 385 to include a return envelope and CF 303 to the latest version provided in the ACL 19-95.
15. Add CF 390 from ACL 19-95 to the Template Repository.
16. Generate the approval NOA when the DCF program is approved.
17. Generate the Denial NOA when the DCF program is denied.

**Outreach**

**Description:**

**Migration Impact**

This SCR will not be addressed until after CalSAWS migration.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

Create manual EDBC

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**11614**

Automated Test :	0	Batch/Interfaces :	323	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	424
DBA :	0	Design :	1445	Eligibility :	1451
Fiscal :	2082	Imaging :	0	IVR/CC :	0
Online :	1109	Performance :	0	Release Communication	502
Reports :	404	Reports Test :	121	Support :	
System Test Support :	2316	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:
  - Clarification added to the user facing pages along with updating screenshots to align with the documented recommendations.
  - Added existing hard validation to the new Disaster program during run EDBC to prevent the user from running EDBC when a worker or if administrative roles are not assigned to the program.
  - Added clarification on conditions for supplemental Disaster run reason.
  - Updated the allotment calculations for supplemental Disaster CalFresh EDBC.
  - Updated CalFresh Daily Reports.
  - Updated Fiscal Cash Reports to include Supplemental Benefit Manual EBT Issuance Register.
  - Removed e-SIgn functionality for CF 385 form.
  - Added Spanish Translations for NOAs.
  - Added clarifications for Approval and Denial NOAs.

- Added addition jobs to issuance sweep procedures
- Added clarification for EBT Outbound Food Benefit Writer Interface
- Added clarification to issuance detail and issuance replacement batch job

See attached design document 'SCR CA-200879 Disaster CalFresh Automation Design Content Revision.docx'

2. Estimate Change:

Before:

Translation ETC: 0

Batch/Interfaces ETC : 318

Client Correspondence ETC: 424

Release Communication Support ETC: 502

Unallocated Hours: 955

After:

Translation ETC: 1.5

Batch/Interfaces ETC : 323

Client Correspondence ETC: 464

Release Communication Support ETC: 504

Unallocated Hours: 960

3. Release Change: None

4. Funding Source Change: None

Pending CCB

**Content Revision  
Status-2:  
Content Revision  
Description-2:**

1. Recommendation Change: {Description of Recommendation Change}

Before: Application Date range was not properly defined.

After: Application Date validation was updated to ensure the Application Date must be between the Application Begin Date and the Application End Date.

See attached design document 'CA-200879 Disaster CalFresh Automation Design Content Revision 2.docx'

2. ETC Change: N/A

3. Release Change: N/A

**Content Revision  
Status-3:  
Content Revision  
Description-3:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision  
Status-4:  
Content Revision  
Description-4:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

# [CA-52597] CA 812 Collections Enhancement Report

Team Responsible:	<b>Reports</b>	Assignee:	<b>Sumanta Mukhopadhyay</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>450</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>01/19/2018 11:42 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Collections, State/Fiscal Reports]</b>	Approved by Committee:	<b>2020-03-17 00:00:00.0</b>	Other Agency Cross Reference:	<b>CIV-12446</b>

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:**

The CA 812 and the CA 812 Detailed Backup Reports are generated as two separate reports. This causes users the need to open both reports and go back and forth between them when validating information. The CA 812 Detail Sheets are also limited in the number of data fields it provides to help county workers validate information reported on the CA 812. Recovery Accounts that are in pending status and have no transactions posted to them at the beginning of the reporting quarter and become 'Void' at the end of the reporting quarter are known as same quarter void Recovery Accounts. Same quarter void Recovery Accounts should not be reported on the CA 812 state report. The Line 8c – New Void Overpayments backup detail sheet lists transactions that are posted to same quarter void Recovery Accounts. This sheet is only there for informational purposes. Cash and Tax intercept transactions are being reported as adjustments due to the transactions not being mapped to Line 4a and Line 4b. The transaction amount/claim by month totals on the detail sheets of lines 3a, 3b, 4a and 4b are not calculating based on how transactions are captured on the report. The CA 812 is not properly reporting Recovery Accounts in the LRS/CalSAWS specific status of 'Pending Approval'.

**Request:**

1. Update the CA 812 report to improve the data validation process.
2. Move some transaction types currently reported as other adjustments to the appropriate transaction lines.
3. Treat Recovery Accounts in 'Pending Approval' status similarly as the 'Pending' status.

**Recommendation:**

1. Combine the CA 812 State report and the CA 812 Detailed Backup report to a single CA 812 report.
2. Create a detailed backup sheet for Line 1b - Adjustments to Item 1a.
3. Add new fields to existing detail sheets.
4. Map cash and tax intercept transactions, currently being reported on Line 8c, to Lines 4a and 4b.
5. Update the logic for transaction amount/claim by month totals on the detail sheets of lines 3a, 3b, 4a and 4b. The 'Other' transaction amount/claim totals will be removed.
6. Remove the entire Line 8c – New Void Overpayments detail sheet.
7. Update the CA 812 logic to treat Recovery Accounts in 'Pending Approval' status the same as if the account was in 'Pending' status.
8. Update the report layout to adhere to reporting cosmetic standards.

**Outreach**

**Description:**

**Migration Impact Description:**

Joint design has been approved through the State/Fiscal Reports Committee. C-IV will implement this Change with SCR CIV-12446 in the 20.09 release.

**Migration Impact Analysis:**

**Alternative Procedure Description:**

The information can be obtained via Ad-Hoc.

**Operational Impact:**

**Estimate:** **450**

Automated Test : 0      Batch/Interfaces : 0      Batch Operations : 0

CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	329	Reports Test :	121	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change:  
 Before: The design did not include an explanation of why the report template was not being updated per ACL 19-05. The transaction total and claim total summary counts located on the detail sheets of lines 3a, 3b, 4a, 4b were not up to date with the summary sheet logic. The TI – IRS (17.5% State) and TI – IRS (17.5% County) transaction types are categorized as Misc. rather than tax intercept collections.  
  
 After: The design includes a note explaining that committee agreed to not update the template per ACL 19-05. The summary totals found on the detail sheet of Line 3a, 3b, 4a and 4b have been updated to reflect the Summary sheet logic. The TI – IRS (17.5% State) and TI – IRS (17.5% County) transaction types have been mapped to Line 4b – Tax Intercept Collections.

2. Estimate Change: N/A
3. Release Change: N/A
4. Funding Source Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

**Content Revision Status-3:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**

**End Content Revisions**